

National Agritourism Strategy Framework

A U S T R A L I A N
**REGIONAL
TOURISM**
L T D

Agritourism 2030

Acknowledgement of Country

Australian Regional Tourism acknowledges and pays respects to the Traditional Owners of Country as the sovereign people of the lands and waters on which we live, work and play. We acknowledge Elders – past and present and their ongoing connection with Country.

©2022 Australian Regional Tourism Ltd

Table of Contents

Our partners	4
Strategy at a glance	5
Endorsement of the plan	7
Our consultation process	8
Introduction and background	10
What is agritourism?	12
Agritourism is an eco system	14
Strong foundations for growth	16
Competitive advantage for Australia	18
Caring for Country	22
Sustainable Agritourism	24
Our stakeholders	26
Diversifying into tourism: the farmer journey	28
Context for diversification	30
Insights that informed our strategy framework	32
Strategic framework - roadmap to 2030	34
Strategy framework	36
Strategic and operating context	38
Key enablers of Agritourism	40
Agritourism 2030: Six strategic priorities	43
Outline of recommendations	44
Appendices	46
Sources & other links	47

Our partners



Credit: South Australian Tourism Commission

Strategy at a glance

Our purpose

Advocate for sustainable on farm experiences

Aim

Our aim is to support a thriving, diverse Agritourism sector that evolves sustainably, responsibly, is embraced by communities and loved by visitors.

Collaborative approach

Continue collaborating across agriculture, tourism and Australian communities. Collaboration is essential. All stakeholders together will grow Agritourism.

Who benefits?

Growing Agritourism has a multiplier impact on farmers and farm businesses, regional communities and the lives of visitors who choose to support these experiences.

Responsible growth

Sustainability of farm businesses and regional communities is at the heart of diversification into Agritourism. Respect for Country, craft, traditions, seasonality, quality and above all time underpins growth of a world class Australian Agritourism sector that aligns our global reputations for excellence in both agriculture AND tourism.

Recommendations

This plan makes a series of recommendations that support agritourism sector growth to 2030.

First Nations consultation

This plan has been produced in consultation with First Nations representatives who encourage farmers to adopt a “caring for Country” approach to land custodianship and welcome collaboration in the growth of Agritourism.

Our Themes

Australian Agritourism is: Distinctive, Progressive, Collaborative, Respectful and Proud.



Endorsement of the plan

For many years Australian Regional Tourism has championed Agritourism as a critical opportunity for the agriculture and tourism industries in Australia. This partnership of two significant industries is vital for the future with a natural relationship and synergy - of wide-open spaces, quality produce and friendly people.

Australian farming culture is intrinsically linked to regional Australia and the natural curiosity of both telling and listening to stories about our land and farms has long been sought after. After years of constraint through the pandemic, both domestic and global travellers seek to reconnect with the outdoors, trace the origins of food and drink and be entertained by people whose lives are linked to the seasons.

At year end December 2019, total on farm Agritourism was valued at A\$17.4B, split as \$10.0B in winery tourism and \$7.4B of those who visited farms or farm gates. This strategy seeks to accelerate overnight visitors to regions who participate in agritourism, especially focused on producers of food, produce and craft, learning from the example set by the wine industry over more than 30 years of export and tourism development. The opportunity is to increase the value of spend by visitors to farms and farm gates from \$7.4B to \$18.6B by 2030.

This strategy framework is the beginning. There are challenges, of course, but none insurmountable.

The success of this strategy will be enabled by:

- Funding support for human resources and financial support to continue the momentum

- Aligned, engaged and supportive stakeholders
- The right policy and regulatory environment
- Access to quality insights
- A focus on community, cultural, economic and environmental sustainability

Beyond that, having a national strategic approach will be vital as Agritourism moves from a domestic market focus to inbound market growth. Positioning Agritourism to appeal to international high yield travellers who are seeking more immersive experiences will ensure farmers can sustain diversity in businesses on their terms and be rewarded with the social and emotional benefits tourism can deliver.

Ultimately, this plan seeks to provide farmers, tourism, government and investors with confidence that Agritourism is an industry for the future. One that is growing, enduring and sustainable. A partnership of Agriculture and Tourism that can join the visitor economy in sustaining regional Australians in the locations they love, helping provide a way for communities to share their passion with interested and engage visitors from around the world.

Coralie Bell
Chair, Australian Regional Tourism

Our consultation process

In developing our plan, we were guided by the need for both the Agriculture and Tourism sectors to support the future roadmap for Agritourism. Farmers diversify into tourism so it was vital we consulted with farmers who have made the conscious choices to become a tourism operator to share the opportunities and challenges for the learning of others. We also sought feedback on what gaps existed in the information available to them and what advice they would give those embarking on the journey.

Across the project, we engaged with regulatory and government stakeholders, consultants to the agriculture sector, State and Territory tourism entities, local government representatives and many others interested in a future thriving Agritourism sector.

First Nations representatives provided valuable input supporting the opportunity for Agritourism to be both more inclusive of Indigenous approaches to land management and more represented by Indigenous experiences in the future.

Using a number of design thinking techniques we generated dozens of ideas of how we might make it easier for more farmers to diversify into Agritourism. These ideas distilled into six strategic themes or priorities that form the framework of this strategy.

Image location: Queensland



Credit: Tourism and Events Queensland

Introduction and background

In 2018, Australian Regional Tourism released the discussion paper “Boosting Regional Tourism through Agritourism” presenting the first national view of the opportunity for farm diversification into tourism. Adverse farming conditions, bushfires, floods, droughts and more recently the global COVID-19 pandemic have highlighted how precarious life on the land can be, reminding many that a diversified income, social network and skillsets for expanding families can sustain communities and businesses in difficult times.

While International and at times State borders have been closed, stakeholders in the sector have not been idle. Advocacy groups such as the Queensland Farmers Federation have co-authored policy statements and discussion papers of their own, State Governments have created cross portfolio working groups and supported Statewide legislative reform (NSW and SA) initiated whole of government sector development programs (Tasmania). Agritourism’s strengths of space, distance and simplicity have proven appealing to domestic visitors as State borders have reopened and travel for business and leisure are possible once more.

The release in March 2022 of the *Thrive 2030: the Reimagined Visitor Economy*¹ identifies the three vision elements of **collaborate, modernise and diversify** for the tourism industry to thrive by 2030 which provide significant opportunities for the tourism industry and agritourism sector. The challenges facing the broader tourism sector identified in “Thrive 2030” are also those facing the agriculture sector in recovery namely labour shortages, skills deficits and a need for innovation in a post pandemic recovery.¹

Momentum is growing across the States and Territories for Agritourism as a deeper and richer expression of food, drink, community and passions.

This National Strategy Framework is designed to unify an emerging sector under one voice in two ways:

- Support a sustainable approach to growth, reflective of the holistic benefits of Agritourism to regional communities, land, culture and business.
- Consider how a unified national framework with an eye to Agritourism’s export potential and how the sum of our States and Territories enhance our tourism and nation brands international reputations into the future

This strategy framework aims to complement existing and future strategies for tourism, regional employment and agriculture.

Who is this strategy framework for?

Designed to raise confidence, build capacity and inspire action, this work has been prepared for anyone keen to support a thriving Australian Agritourism sector by 2030.

This work has been made possible for Australian Regional Tourism by an Australian Government Building Better Regions Fund Grant (Austrade, 2021) and a partnership with Airbnb. With 92% of On Farm experiences delivered in regional Australia in calendar year 2019, there is no better entity than Australian Regional Tourism to facilitate this plan.

What is Agritourism?

Definition: Agritourism is a type of experiential travel which connects people to product or produce, delivered on farming land through a direct “on farm” experience.

Four essential elements:

1. Combines tourism and agriculture industries;
2. Attracts members of the public to visit on farm;
3. Farmers diversify from agriculture into tourism, increasing farm income and/or employment; and
4. Provides recreation, entertainment and/or educational experiences related to the agriculture enterprise.

To be acknowledged as Agritourism, an experience must be delivered on farm and include one or both of engagement with people and product.

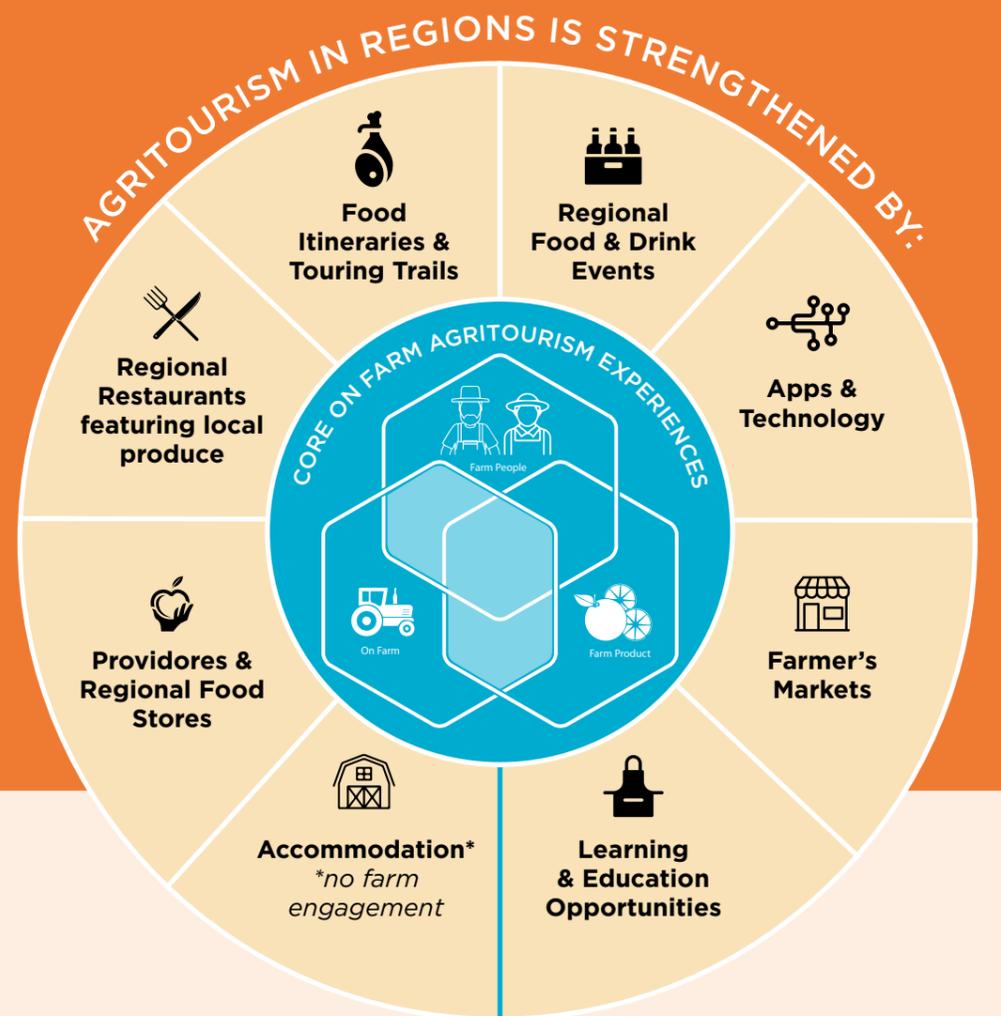


Agritourism is an eco system

Core Agritourism is strengthened by regional supporting services, creating an eco system of visitor experiences.



Credit: Tourism Australia



- Farm tours & demonstrations
- Caravan sites/ glamping/camping
- Farm to Fork cooking classes
- Pick your own produce
- On farm cafes &/or restaurants
- Experiential farm stays & B&B
- Indigenous cultural experiences
- Educational experiences
- On farm retail outlets
- On farm events - weddings/conferences etc.
- Behind the scenes tours
- Business agriculture experiences

Strong foundations for growth

Australian international and domestic (overnight and day) tourism was valued at \$138 billion in 2019, with those who visited farms gates and/or wineries spending \$17.4 billion on their trips. In 2019, domestic overnight visitors spent a total of \$7.1 billion and domestic day visitors \$1.0 billion on trip itineraries that included a farm and/or winery visit. International visitors spent a further \$9.4 billion in Australia on trips with farm and/or winery visits.²

There is much the food and fibre sector can learn from the wine industry when it comes to tourism diversification.

Industry development, export market development, tourism marketing training and the success of Tourism Australia's past *Restaurant Australia* Campaign in 2016 provides a ready case study of sector growth. This was supported by sustained product and experience development over time.

This strategy framework encourages similar growth and tourism maturity for food and fibre producers as has been experienced in the wine industry.

With a focus on responsible growth, the goal is to encourage growth in visitor spend at a higher rate than visitor numbers, attracting more engaged high yield overnight visitors into regional Australia.

Given the impact of COVID-19 on international and domestic visitation, year end December 2019 represents the best full year data set to review.

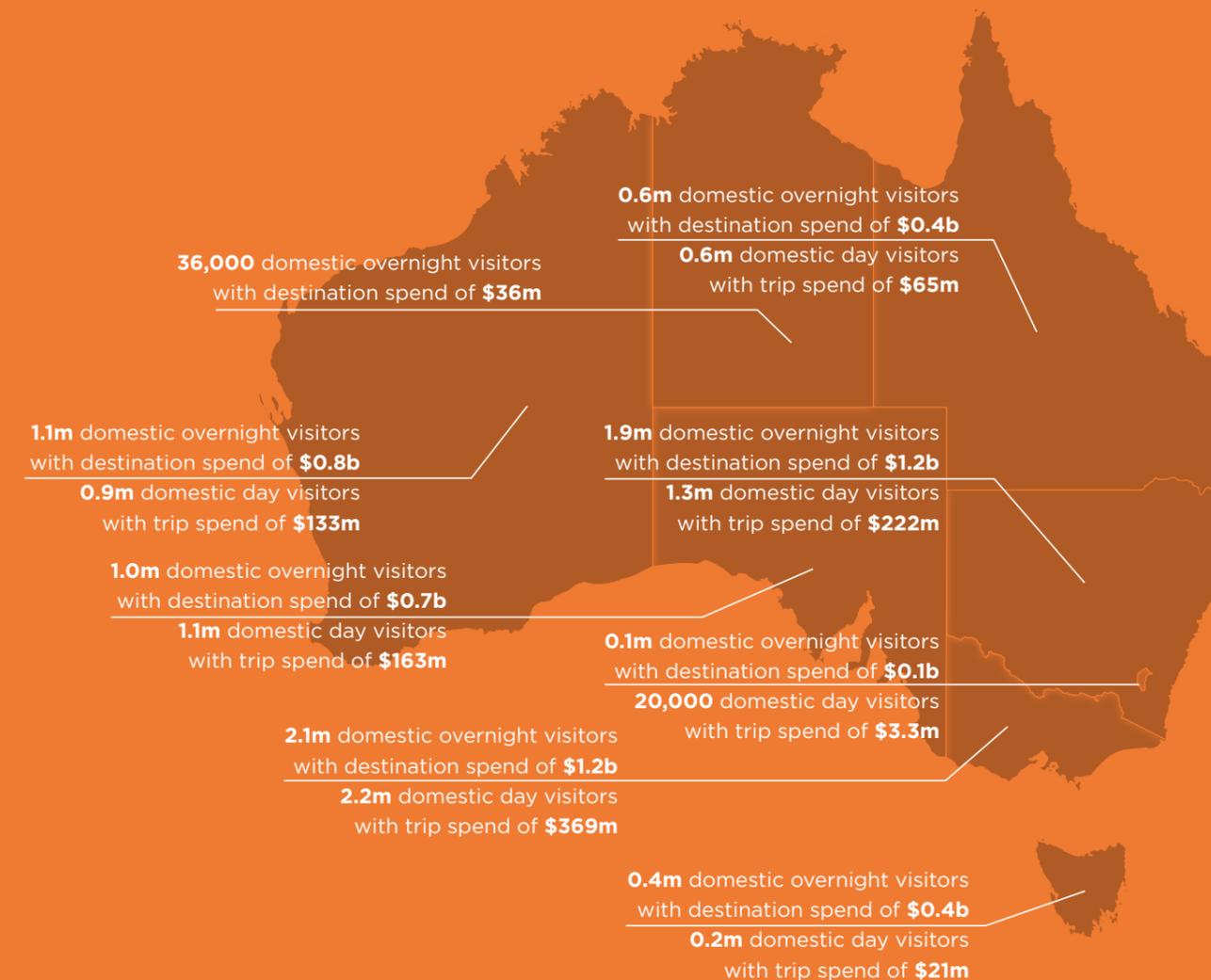
Key insights from 2019:

- In total there were 15.6 million international and domestic visitors to farm gates and/or wineries. These visitors spent \$17.4 billion on their trip
- There were 1.1 million international visitors who visited farms/farm gates. These visitors had trip spend of \$5.6 billion in Australia
- International visitors with farm and/or winery visits totalled 2.0 million. They had trip spend of \$9.4 billion in Australia
- There were 2.1 million domestic overnight visitors to farms/farm gates. These visitors had trip spend of \$1.6 billion
- Domestic overnight visitors with farm and/or winery visits totalled 7.4 million. They had trip spend of \$7.1 billion
- There were 2.0 million domestic day visitors to farms/farm gates. These visitors had trip spend of \$0.2 billion
- Domestic day visitors with farm and/or winery visits totalled 6.2 million. They had trip spend of \$1.0 billion

In 2019, the CSIRO in its report *Growth Opportunities for Australian food and Agribusiness – Economic Analysis and Market Sizing*,³ identified Agritourism as being a potential \$18.6B by 2030 largely off the back of international visitor growth.

In 2019, the risks to growth included, labour shortages, infrastructure quality and environmental factors.

Additional risk factors since COVID-19 include pandemic impacts on travel access and more recently, biosecurity impacts limiting visitor access to farms. Tourism capability and changing tourism distribution are also key risks to achieving growth.



Competitive advantage for Australia?

Australia is a world-leading producer and exporter of agriculture products. We are known globally for clean, green and safe produce and have a history of investment in agriculture innovation.³

Australia's export markets for agriculture align to Australia's source markets for inbound tourism meaning customers in similar markets are exposed to Australian food and drink exports and Australia's tourism marketing messaging.

Australia's isolation has fostered innovative approaches in agriculture, resilient people and unique environments. Our biosecurity and quarantine methods are designed to protect our exceptional flora and fauna.

Changes in climatic conditions such as droughts and bushfires are changing mindsets and methods, and evolving farm and family structures. The profile of farmers is changing: the big are getting bigger and there is an influx of small farmers in rural fringes pursuing a more connected wholesome lifestyle.

Increasingly, changing personal values are driving a move towards more sustainable farming methods and land management practices, which are appealing to a more discerning global traveller.

The elevated prominence of food provenance in our restaurant and hospitality sector supports Agritourism's initial alignment with food and drink tourism.

Australia's previous food and drink tourism experiences have a strong reputation overseas and the success of existing campaigns such as Tourism Australia's Restaurant Australia has resulted in increased spend in the sector.

Tourism Australia and the States and Territory tourism organisations continue to advocate for food and drink tourism through public relations, social media and digital content.

A growing respect for the traditions of First Nations people and land practices is fostering collaborations and new business models and providing further opportunities for competitive advantage on a world stage.

With 92% of Agritourism experiences delivered in regional areas, many with enviable landscapes, the sector has the prospect of enhancing Australia's global brand reputation and supporting tourism yield and dispersal growth to 2030.

What we heard: "Australian Agritourism? There's an authenticity of the people, the storytellers, the produce, the story of the food provenance. All delivered in these landscapes that are made for a tourism ad."
- Queensland Agritourism Operator

Australia's top ten export markets (as at Dec 2019):

1. China
2. Japan
3. USA
4. Indonesia
5. South Korea
6. India
7. Vietnam
8. New Zealand
9. Hong Kong
10. Singapore

Australia's top international tourism source markets (as at Dec 2019):

1. China
2. United Kingdom
3. USA
4. New Zealand
5. Japan
6. India
7. Singapore
8. South Korea
9. Hong Kong
10. Malaysia





The symbiotic relationship Indigenous people have with the land is encapsulated in the sayings “**Caring for Country**” and “**Look after Country and Country will look after you.**”

Image location: Australia

Caring for Country

Caring for Country is as much the emotional and physical wellbeing of people as it is the practice of looking after the land.⁵

Natural disasters have provided some farmers with an opportunity to engage with Traditional Owners, seeking advice after floods or bushfires to regenerate their land with endemic species or understand traditional and regenerative land management practices.

Agritourism has also brought producers and First Nations people together through collaborations involving native ingredients, stories, art work and social enterprise models supporting local education programs.

There is a burgeoning Indigenous Agritourism sector supporting the propagation of native ingredients and

medicines at scale, and with some support and encouragement, these have the potential to become flavours synonymous with Australia.

Restaurant and supply chain partners represent growth distribution opportunities for bushfoods towards 2030.

Formal Indigenous involvement in Agritourism is immature, but developing. All will benefit from respect for First Nations knowledge, protocols and custodianship. There is a collaborative way forward that recognises Cultural intellectual property and sees value for communities as this sector grows.

Indigenous inclusivity in Agritourism

While often considered as the land and sea management practices and outcomes, more recently, it's being acknowledged that including the stories and customs as well help support identity, health and cultural life.

Multigenerational non-Indigenous farmers expressed similar connections to place as did Indigenous people on Country, albeit with a greater sense of physical ownership than the Traditional Owners.

There is work to be done yet for many farmers to explore their journey with local Traditional Owners, acknowledging Country and collaborating on a new shared future.

Agritourism may provide an opportunity for collaborations between farmers and Traditional Owners for the benefit of all Australians.

Learnings from First Nations Australians have the potential for caring for Country traditions to transcend from being Indigenous to becoming the regenerative practices we take to the world as being Australian.



Credit: Tourism Australia

Sustainable Agritourism

Encouraging Agritourism to be as sustainable as possible as it evolves makes good business and community sense.

Many councils across Australia are implementing sustainable and circular economy practices as part of their normal operating businesses.

This means new planning applications and economic development will be assessed against their ability to support sustainable outcomes.

Developments supportive of good social, cultural, environmental and economic outcomes and are aligned with all layers of Tourism, Indigenous engagement and Agriculture policies are the sorts of sustainable businesses local communities will need in the future.

What is sustainable tourism?

Sustainable tourism is defined by the United Nations World Tourism Organisation as “tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities”.⁶

In practical terms, applying sustainable tourism policies and management techniques means balancing social, cultural, economic and environment considerations of stakeholders.

What we heard: “Responsible supply and demand growth is really important as Agritourism is encouraged. The growth of Agritourism will be best served by bringing Agriculturalists into tourism and encouraged in a way that it supports family, farm and farmer to share what they can on their terms.” - Tasmania Agritourism Consultant

Agritourism is evolving as an inherently sustainable form of tourism. Examples of this include:

- Supporting for rural and regional economies, helping people stay in their communities
- Embracing Indigenous Australians ethos of “look after Country and Country will look after you” with growing adoption of regenerative farming and circular economy practices
- Increasing understanding of culture and heritage
- Supporting environmental practices
- Locally retained earnings
- Visitor experiences and expenditure that support increased skills for local people, provide jobs and diversify farm income.



Credit: Visit Victoria

Our stakeholders

The insights from the consultation helped define the Agritourism stakeholders. All Stakeholders play a part in the growth journey to 2030.



Credit: Tourism Australia

A stakeholder engagement approach is available as a companion to this document.

Our stakeholder engagement goal is an informed, engaged community of supporters advocating for agritourism growth to 2030.



Stakeholder Engagement Principles for Sector Growth

Relevant & Inclusive	Valuing the input of all sectors, we will support relevant engagement as stakeholders and the sector matures
Simple & Clear Communication	Open and transparent access to tools and information for collaborative growth
Leadership & Learning	Sharing best practice from across the country & around the world to support sector innovation and learning
Align Conversations	Australian Regional Tourism will provide a voice of leadership to Government, collaborating across Tourism and Agriculture to represent the growing Agritourism sector

Diversifying into tourism

The Farmer Journey: Engagement with stakeholders mapped the beginnings of the farmer diversification journey.

Farmers reported it took between three and five years end to end to launch a new diversified Agritourism business on their farm. The timeline was influenced by having to learn as they go, their normal farming work demands and the process of engaging with local council around submitting a planning application.

Tourism developments are often complex, not an obvious land use, pose biosecurity risks and require the interpretation of legislation. Clear strategic plans and plenty of support before applying made the process smoother.

Credit: Tourism Australia



The Farmer to Agritourism Journey



Key insights of what is happening at each stage of the journey

<p>Economic, social or environmental factors trigger a change for the future.</p> <p>Tourism is one of many options, but often has low awareness at the beginning.</p>	<p>Developing a plan and a budget for the project often takes 1-3 months.</p>	<p>Be it acute or planned, the decision to diversify is rarely a linear one. Most ideas require council or state government approval in some form. Consultation & negotiation often see the original idea amended and the project delayed. Many farmers are unaware of the cost, time and compromise involved in planning applications and find the process bureaucratic and overwhelming.</p>	<p>If approved, developments take between three and 18 months to launch. This is when farmers often realise they are in tourism</p>	<p>Many farmers went on to add more than one tourism experience to their farm.</p>
--	---	--	---	--

Opportunity for improvement to encourage growth

<p>Engage early to explain Agritourism to key farm advisors and farm networks.</p> <p>Share with the community the benefits of the Visitor Economy.</p> <p>Provide mentors.</p>	<p>Know your region & develop to what's possible & what visitors will want.</p> <p>Engage with council to understand the regulations before settling on a concept.</p>	<p>Councils can: Engage and support farmers as often as possible before applications are made. Supporting with advice upfront makes for a smoother planning journey all round.</p> <p>Councils can: Publish your council's planning process and ensure applicants are aware that amendments don't represent failure.</p> <p>As a farmer, get help and guidance through the process.</p> <p>Federal & State Governments can: support by cutting red tape and reevaluating regulatory conditions to support growth</p>	<p>Introductions to local tourism teams will provide a pathway to launch and access to marketing and distribution support.</p>	<p>Support with training in experience delivery and developing richer, more diversified on farm experiences.</p>
---	--	--	--	--

Context for tourism diversification

Farmers explored new business streams for one of five reasons, with tourism often a by-product of a new product or lifestyle change:

- **Economic:** In the wake of a significant natural event such as bushfires or floods, farmers seek to diversify their income and spread business risk. For some, natural disasters are driving a reboot of their relationship with the land and farming practices.
- **Take back control of distribution and product:** Adding a direct sell distribution channel such as a farm shop and online website presence gives direct contact with customers, increased brand loyalty and reduced distribution costs.
- **Need more jobs for family:** The next generations seeking to stay on the farm need meaningful employment and often bring different skills seeks beyond farming.
- **Need for more social contact:** Regional and rural locations often bring isolation. Inviting visitors in to experience farm life brings diversity of social contact and a renewed sense of purpose to farming.
- **Lifestyle change:** Be it chosen (tree/sea change) or imposed (redundancy driven), there is a growing number of artisan farmers on the rural fringes of cities exploring regenerative and sustainable farming practices with a more “for purpose” sustainable business focus.

What we heard: I needed to value add to my fruit farm as fruit alone was not going to be enough to sustain the farm. Pick your own, led to organic jams and dried fruit which turned into a farm store. People loved the farm setting, so that turned into a café and then some accommodation. The side hustle of tourism is now the main hustle with bigger turnover than fruit.

- SA Agritourism Operator

What we heard: People would often leave our winery without buying anything and that wasn't sustainable. We knew we had a unique location, wanted to sell more direct and deliver an immersed in the winery experience that no one else did. This led to the development of the restaurant, wine matching menus, picnics in the winery and behind the scenes tours. These are packaged and can now be sold through the travel trade.

- NSW Agritourism Operator



Credit: South Australian Tourism Commission

Insights that informed our strategy framework

The Agritourism Journey often starts as a renovation project.

The building and renovation triggers engagement with the local council for a planning permit.

Projects almost always exceed budget due to the external expert reports and stakeholder engagement required to support the planning application.

Some are encouraged to apply for grants to support their project. Farmers are surprised that the grants are often funding specialist reports required for planning submission, not actual infrastructure.

What we heard:

"We budgeted \$300,000 to renovate our shed into an event space which included a \$150,000 grant. Our original budget only covered the cost of the drawings and all the expert reports we needed to submit our application."

- NSW Agritourism Operator

Many don't realise they are in tourism until they launch.

What we heard:

"We decided to renovate two old farm houses to bring in some extra income and use for workers. Our focus was on the building works. No one mentioned until we finished that we were in tourism. It's only then we thought about how we were going to find the people to stay."

- NSW Agritourism Operator

Who they are developing the experience for is often not considered.

What we heard:

"There's a fine line between authentic or rustic and cheap. We went cheap first, and then to attract a visitor that would pay more, we focused more on authentic and better quality. Wish we'd known that at the start."

- NSW Agritourism Operator

What we heard:

"Our commercial kitchen for catering is in a shipping container. It's mobile and was easier to get permits for than building a permanent one."

- NSW Agritourism Operator

It takes 1-3 months to develop the business plan or concept and between three months and three years for council approvals.

Community engagement can be challenging in regional communities where objections can become personal and perceived conflicts of interest require careful management.

What we heard:

"In small communities the people in planning might be the people you play footy with on a Saturday, coach your daughter's netball team or have a beer at the pub with on a Friday night. And everyone has an opinion on what you should do!"

- QLD Agritourism Operator

It's not unusual for the journey to take between three and five years from inception to launch.

What we heard:

"We wanted to add a farm shop to our olive farm. Who would have thought a permit condition would be to pay to upgrade our intersection and put a turning lane into our access road at a cost to us of \$300,000. We applied for some grants and eventually, we contributed \$50,000 and I've learnt a lot about civil works, but it did add two years to our project."

- Victorian Agritourism Operator

Many modified their plans to make it easier to get approval.

What we heard:

"We started small based on what was allowable then and have added new experiences over 12 years."

- NSW Agritourism Operator

For many, what they operate now is vastly different from what they originally planned.

What we heard:

"I thought I was breeding bees. Now I'm running courses, education programs and tutorials in beekeeping. It's been really exciting. People love the theatre of dressing up in the safety gear and hearing the whole sustainability story of bees."

- NSW Agritourism Operator.

What we heard:

"Farmers love structure and agritourism as a sector at the moment has no structure. I didn't know what I didn't know. Would have loved a handbook."

- WA Agritourism Operator



Strategy Framework Roadmap to 2030

Strategy Framework

Our themes for agritourism:

These five themes repeatedly came through as what stakeholders valued about Australian Agritourism:

Distinctive: Diverse, authentic, proud, bold and innovative, we blend the best of Australian Culture, Agriculture and Tourism for shared benefits.

Progressive: Our farmers and makers are inspired by Australia's earthly treasures to create and share new experiences with future visitors

Collaborative: Developed with stakeholders, the strategy will realise its potential when we work together to forge a sustainable regional industry

Respectful: Respect for country, craft, traditions, seasonality, quality and above all time underpins growth of world class Australian Agritourism

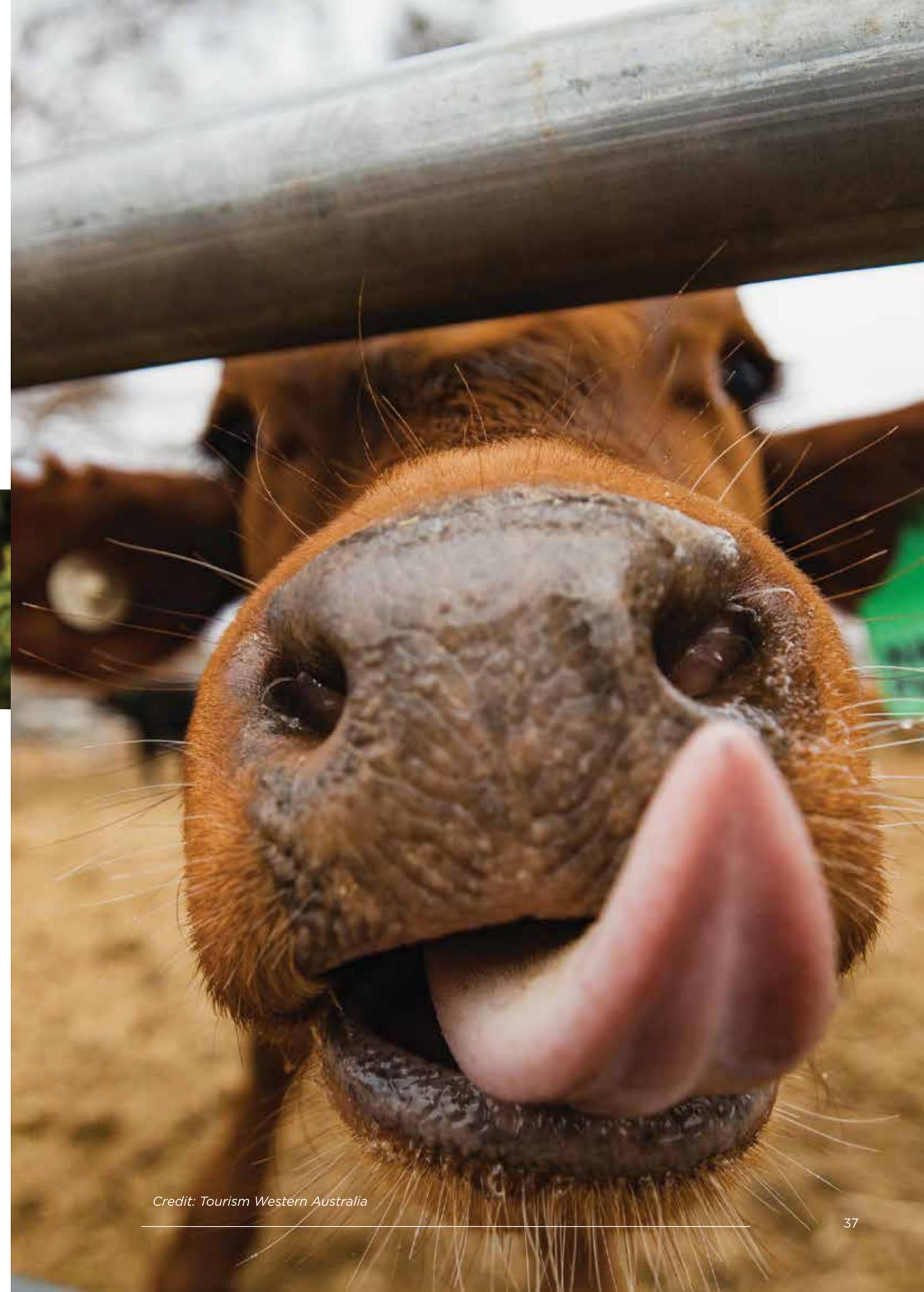
Proud: As the richness of Australian Agritourism grows it is celebrated by communities, producers, Australians and visitors globally.



Credit: Destination NSW

Strategic Priorities

1. Support sustainable & inclusive farm diversification
2. Support community capability and capacity building with a focus on regional employment
3. Develop high quality, distinctly Australian Agritourism experiences
4. Promote the sector responsibly, with an alignment to food and drink
5. Encourage genuine collaboration and enduring partnerships
6. Provide leadership to support inclusive growth.



Credit: Tourism Western Australia

Strategic and operating context

The stakeholders in Agritourism are many. The rationale for this strategic framework is to align policy at all levels of government with a universal definition of what Agritourism and a common view of the opportunity Agritourism represents for farmers and tourism.

Tourism and hospitality represent 2.6% of Australia's GDP and employs more than 660,000 Australians. Agriculture represents 1.9% of GDP and 2.0% of employment. Both are global export categories and support Australia's nation brand reputation. Agritourism to 2030 represents a meeting of two significant Australian industries.

At a national level, this plan is informed by Thrive 2030 – The Re-Imagined Visitor Economy, which provides a national strategy for Australia's visitor economy recovery and return to sustainable growth.

The vision for Thrive 2030 is for Australia's visitor economy [to] provide world-leading services and visitor experiences to consumers while delivering significant and sustainable benefits to the Australian community.¹

Thrive 2030's strategic themes of collaborate, modernise and diversify are all embraced by Agritourism 2030. This strategic framework has the potential to support substantial growth to Australia's visitor economy and encourage prosperity and wellbeing across regional visitor economies.

Tourism Australia's Corporate Strategy FY21 – FY24 provides the strategic context for the Australian tourism industry's COVID-19 recovery roadmap which includes supporting industry recovery. Food and drink tourism is a continued experience pillar of brand Australia which Tourism Australia uses to represent Australia in their export marketing.

Several Australian states have Agritourism sector plans in development; others are supporting Agritourism as a deepening of their food and drink sector plans. Food, drink and agriculture tourism already feature heavily in regional tourism plans and business events strategies.

Tourism Research Australia collects tourism data via the International Visitor Survey and National Visitor Survey. (IVS and NVS respectively). Data relating to itineraries including a farm gate, winery, distillery and brewery visits are collected quarterly.

When surveyed for this project, 84% of local councils and 72% of regional tourism organisations nominated agritourism as a top five priority opportunity.⁷

Also at a national level, this plan is informed by national Agriculture policy to future proof Australia's agriculture prosperity under Agriculture 4.0 through innovation, agribusiness diversification and digital transformation.

Research and development in agriculture is heavily supported in Australia with statutory Regional Research and Development Corporations and entities such as the CSIRO investing in farm diversification, product and technology transformation.

In 2018/19 the CSIRO identified Agritourism as one of several farm diversification opportunities, with the potential to be valued at \$18.6B by 2030.

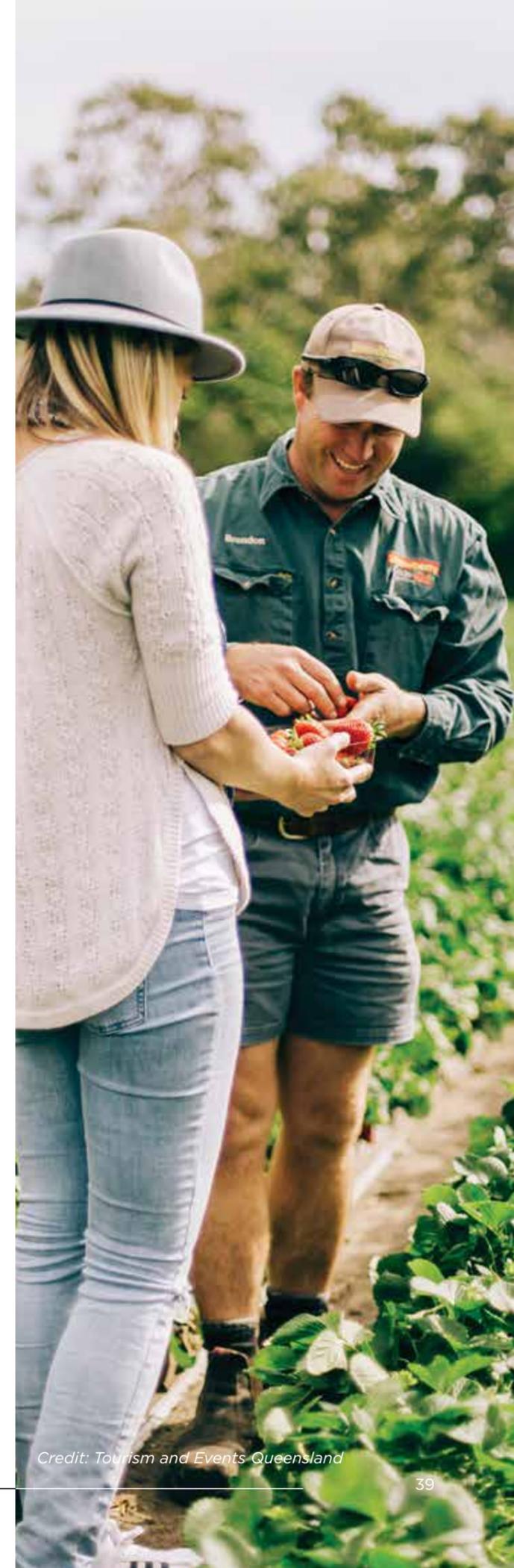
Australia is one of several countries embracing Agritourism as a supply side opportunity. Others include Italy, France, the United States of America, Scotland, Canada and New Zealand.

Post COVID-19 they are aligning to consumer trends in demand for food provenance and greater understanding of where food comes from.

The operating context for this framework is one of recovery, resilience and review. Agritourism pre-COVID was growing strongly with access to international workers and international travellers underpinning optimism.

Resource and skills shortages continue to hamper recovery efforts. Farmers have been forced at times to choose between resourcing their agriculture or their tourism entities, without staff to do both. Many were forced to close for long periods during lockdowns but have been buoyed by domestic visitors demand for regional experiences as borders reopened.

Digital transformation in regional areas is a continued operational discussion for both tourism and agriculture, one that provides many opportunities for experience delivery support and customer communications.



Credit: Tourism and Events Queensland

Key enablers of Agritourism

Making it easier for more farmers to diversify into Agritourism can be enabled by:

Funding of dedicated human resources to implement the strategy

This strategy is largely focused on stakeholder engagement and leadership which are both best executed with dedicated resources for the first three years. Resourcing this strategy will enable the momentum to continue.

Financial support for the enabling projects identified in this plan unlocks the roadmap to 2030.

Aligned, engaged and supportive stakeholders

Aligning both Agriculture and Tourism sectors is vital to the future success of Agritourism. The implementation of this strategy requires the support of partners and stakeholders to leverage their networks and amplify the benefits of Agritourism.

Open collaboration across stakeholders for the greater good of Australia is vital to this sector's prospects. Be it sharing of outcomes from pilots, mentoring programs for farmers from other farmers or open engagement with Traditional Owners to support healing or land regeneration there are only positive benefits in working together.

Sharing experiences and stories is inherently Australian and collaboration across businesses, Governments and ultimately story telling with our target audiences underpins our success.



The Right Policy and Regulatory Environment

Adopting a National understanding of Agritourism and the experiences that are Agritourism will help align Federal, State and Local levels of government and provide clarity for those supporting farmers on the journey.

This will require support and training for local planners and council master planners.

Cross portfolio policy development and support for Agritourism as a viable farm diversification option will provide vital guidance for regional councils to enable projects and reduce red tape.

The agriculture sector can lead state level regulation reform to support reduced red tape for the interpretation of planning, food safety regulations, on farm processing and permitted land uses.

The insurance sector will need guidance to support new activities on farms that are different to agriculture use.

Access to Quality Insights:

Quantifying the size, scale and economic impact of Agritourism to our regions supports confidence in the sector for farmers, governments and investors. It helps influence access to funds to implement this strategy across the six strategic priorities and support sector growth.

Agritourism is what the sector calls itself, blending both Agriculture and Tourism, but is not a marketing name for the category.

Future growth will require insights into consumer drivers of demand for both international and domestic markets.

International market growth will require online and offline trade distribution focused on the countries aligned to Agriculture exports and those countries where Agritourism is already popular.

A Focus on Sustainability

Agriculture and tourism are two industries already innovating towards net zero by 2050. Agritourism has an opportunity to be a showcase of stewardship across community, Culture and business sustainability as well as demonstrating best practice land management. Supporting, benchmarking and celebrating this journey is important for existing and new operators. Access to tools, information and resourcing for Agritourism operators will enable a more sustainable sector.



Agritourism 2030: Six strategic priorities

01

Support sustainable & inclusive farm diversification

Engaging new farmers and encouraging existing operators to diversify. Making it easier to build sustainable, profitable businesses and increasing Indigenous engagement in the sector.

02

Support community capacity building with a focus on regional employment

Enabling skills and jobs development for farm families and the broader community. Expanding from farming to consumer tourism requires increased resourcing and new customer facing skills and digital and marketing capability.

03

Develop high quality, distinctly Australian agritourism experiences

Experience development & improvement is required to deliver to our vision of attracting higher yielding visitors to regional areas.

04

Promote the sector responsibly, with an alignment to food and drink

Agritourism leans heavily into Australia's reputation for food and drink, both in agriculture and hospitality. Support generating demand with a focus on quality not quantity, sharing the story of people, place craft & produce.

05

Encourage genuine collaboration & enduring partnerships

Leverage the experiences of others to support broader thinking, knowledge sharing and strengthen the sector's timeliness to market.

06

Provide sector leadership to support inclusive growth

Australian Regional Tourism will support leadership of the sector as it evolves and matures, bringing the stakeholders on the growth journey.

Outline of recommendations

01

Support sustainable & inclusive farm diversification

- National Priority Policy Position on Agritourism unilaterally adopted to support growth goals
- Support planning reforms by States and Territories to reduce red tape
- Explore tax reform for recognition of agritourism as an agriculture subsidiary
- Support local government communication reforms to assist the development of new agritourism initiatives
- Work collaboratively with States and Regions to support Agritourism Business Development Programs
- Create introduction to tourism and agriculture resources
- Ensure producers are informed of the business case for Tourism
- Engage with trusted Business Advisor networks to elevate the awareness of tourism as a diversification option
- Provide education and training on sustainable business practices and net zero operations
- Identify and nurture Indigenous Agritourism opportunities
- Develop resources on Indigenous engagement, collaboration and business development opportunities
- Create infrastructure grant programs specifically for Agritourism
- Encourage mentoring
- Targeted agritourism capacity building programs focused on the integration of agriculture and tourism including skills, insurance, risk mitigation and biosecurity

02

Support community capacity building for regional employment

- Create employment economic indicators to support the business case for attracting and retaining workers
- Invest in across region mentor programs to support upskilling and networking
- Develop a National Agritourism leadership network with a focus on supporting young leaders to stay in regional areas
- Provide access to training resources in Customer Service, Digital Marketing, Tourism, Retail Skills & Tour Guiding
- Provide access to training resources in understanding agriculture for RTOs
- Foster First Nations capacity building

03

Develop high quality, distinctly Australian agritourism experiences

- Agritourism and Farm Gate Grant Program to encourage Australian Agritourism
- Leverage Agriculture's capability in R&D for new product development based on consumer demand
- Provide access to high quality consumer insights and sentiment tracking to support new experience development
- Develop experience development resources informed by a product development lifecycle
- Create resources to demystify the travel trade and travel distribution
- Work with Tourism Australia and States and Territories to grow trade distribution
- Align strongly, but not exclusively with the food and drink sector
- Identify and develop storytellers for the sector, create content to share through channels
- Encourage farmers to celebrate their uniqueness and support authentic, passionate storytelling
- Recognise opportunities for Indigenous experience development and support with dedicated resources

04

Promoting Australian Agritourism responsibly

- Develop an initial three year marketing plan, including a pathway to international market development
- Create high quality marketing assets for existing "halo" Agritourism experiences for wide industry use
- Work with the Australian Tourism Data Warehouse to catalogue existing operators and categorise Agritourism listings to support better online distribution
- Collaborate with Agriculture sector to develop a consumer facing name for the category to support growth
- Encourage inclusion of Indigenous Agritourism experiences in Tourism Australia, State, Territory and regional food and drink campaigns
- Aspire to dedicated Agritourism campaigns

05

Encourage genuine collaboration and enduring partnerships

- Encourage the development of intra and inter region touring routes connecting producers together
- Support regional clustering of producers and experiences, enhancing visitor experiences
- Facilitate sharing of best practices through case studies and networking
- Leverage agriculture industry knowledge and networks for export market development
- Collaborate with the wine industry to share learnings and streamline growth
- Provide guidance on collaborating with Traditional Owners
- Collaborate with National Indigenous entities to support business development opportunities and mentoring
- Encourage collaborations with Indigenous agriculturalists for produce and experience development
- Partner with NBN and satellite network providers to ensure network capability to run businesses online

06

Provide sector leadership to support inclusive growth

- Consider the leadership structure required to achieve growth
- Highlight the opportunities for growth with Government
- Develop a comprehensive Stakeholder engagement strategy
- Target the challenges & barriers to growth with solutions
- Strategy implementation
- Develop a targeted Agritourism capability building training program in partnership with Agriculture and Tourism
- Measure and track change in the sector over time
- Develop an Agritourism Australia website powered by the ATDW as a focal point for domestic and international consumer interest
- Develop an Agritourism portal on The Tourism Hub
- Review TAFE Certificate III in Agritourism content to align with future needs of sector growth
- Continue the National Agritourism Conference for an additional two years
- Form a working group of key stakeholders to maintain momentum for growth

Appendices



Credit: Tourism Australia

Sources and other links

1. Austrade (March, 2022), THRIVE 2030: *The Re-imagined Visitor Economy*. A national strategy for Australia's visitor economy recovery and return to sustainable growth, 2022 to 2030
2. Data represents Tourism Research Australia International Visitor Survey and National Visitor Survey Year End 31st December 2019 as the most recent and reliable complete year of Australian Tourism Visitor Data.
3. Wynn, K., & Sebastian, B. (2019). Growth opportunities for Australian food and agribusiness – Economic analysis and market sizing. CSIRO Futures.
4. Austrade (2019) *Australia: Shaping the future of Food and Agriculture, Opportunities for Investment and partnerships in Agriculture*
5. Department of Sustainability, Environment, Water, Population & Communities & Australian Institute of Aboriginal and Torres Strait Islander Studies 2011, *The Benefits of Caring for Country*
6. United Nations World Tourism Organisation definition of 'sustainable tourism' as found on unwto.org: "tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities".
7. Australian Regional Tourism 2021/2022 Agritourism Survey of Members. Question: rate the following tourism sectors in order of priority to your region or council for the next three years.

Agritourism Advisory Committee:

Australian Regional Tourism thanks the following advisory group members for their time and expertise:

Anna Guillan, AM, Chair - Advisory Group Chair, Regional Development Australia

Dana Ronan, Project Officer, Agritourism, Australian Regional Tourism

Lauren Douglass, Executive Officer, Australian Regional Tourism

Nick Baker, Project Sponsor, Australian Regional Tourism Board Member & CEO, Reflections Holiday Parks, (NSW) Chair, Ultimate Winery Experiences of Australia

Karen Fitzgerald, General Manager Experiences, Tourism Australia

Anne Greentree, Director Visitor Economy Strategy, Tourism Tasmania

Maaikje Veerkamp, Public Policy, Airbnb Australia and New Zealand

Andrew Fielke, Chef, Food Entrepreneur, Co-Founder Edible Reconciliation

Dominic Smith, Founder/owner Pundi Produce, Co-Founder Edible Reconciliation

Observer: **Victoria Maigre**, Head of Government Relations, Tourism Australia

Periodic input from the **National Farmers Federation**.

Resources & Agritourism Reading:

"Taste Farm Life" Agritourism workshops
daf.engagementhub.com.au/agritourism

Queensland Farmers Federation Agritourism Roadmap
qff.org.au/wp-content/uploads/2020/11/Queensland-Agritourism-Roadmap.pdf

Australian Farm Tourism
austfarmtourism.com/info/agents/
austfarmtourism.com/wp-content/uploads/2015/04/AFT-Brief-intro-for-agents.pdf

AgriFutures Provenance storytelling for success
agrifutures.com.au/wp-content/uploads/2020/02/19-063-2.pdf

Box Hill TAFE *Certificate III in Agritourism* course breakdown
youtube.com/watch?v=NGtujqdFaOc

ACS Distance Education - Farm Tourism
acs.edu.au/courses/farm-tourism-847.aspx

2016 AgriFutures Tasmania
stategrowth.tas.gov.au/_data/assets/pdf_file/0005/139847/Draft_Agri-tourism_Position_Paper.pdf

Tasmania's *Opening the Gate* initiative
www.agritourismtasmania.com.au

Rebecca Holliday, Kirsten Martinus, Bryan Boruff (2020) *Agritourism in South West Western Australia* Cooperative Research Centre for Honey Bee Products
researchgate.net/profile/Kirsten-Martinus/publication/342354504_Agritourism_in_Southwest_Western_Australia/links/5ef07de292851ce9e7faef39/Agritourism-in-Southwest-Western-Australia.pdf

Central Highlands Destination Action Plan
southerntasmania.com.au/wp-content/uploads/2021/12/central-highlands-DAP-online-version.pdf

Strong Innovative, Sustainable: A new strategy for Agriculture in Victoria
https://agriculture.vic.gov.au/_data/assets/pdf_file/0005/612941/Strong-Innovative-Sustainable-a-new-strategy-for-Agriculture-in-Victoria.pdf

South Australian Productivity Commission - response to Tourism Regulation Review Jan 2022
dpc.sa.gov.au/resources-and-publications/SAGovtResponse-SAPC-Tourism-Regulation-Review.pdf

Harvey Region Tourism Road Map 2031
www.harvey.wa.gov.au/documents-and-forms/plans-and-strategies/2021/december/harvey-region-tourism-road-map-2031-implementation

Regional Development Australia - Murrayland, Riverland, SA
aftd.rdamr.com.au

2020 Queensland Farmers Federation Agritourism Roadmap
www.qff.org.au

A U S T R A L I A N
REGIONAL
TOURISM
L T D

www.regionaltourism.com.au