TOURISM TASMANIA

AGRI-TOURISM

IN SUMMARY

2021/2022

Kelvedon Estate © Jasper Da Seymour

TASMANIA
COME DOWN FOR AIR

Tourism Tasmania

The Bruny Baker © James Vodicka

WHY WE DID THIS WORK

Because we believe that Agritourism represents a further growth opportunity for the Tasmanian tourism industry, particularly for the benefit of regional areas.

- Global and local trends show Agritourism's popularity continuing to grow, expedited by the post-COVID desire to know about how food is made and experience the place its grown.
- The state's strong agriculture and artisan food scene means we can offer premium, authentic experiences—like storytelling, culture, and hands-on activities—that go beyond just price
- But there's a clear chance to better link Tasmania's brand with real experiences on the ground.

OVERARCHING OBJECTIVES

Consumer Journey
End to end consumer journey mapped and understood [including the role of touchpoints, 3rd parties, etc]

Motivations and Needs
Identifying and understanding the motivations and needs driving engagement with Agritourism

Attitudes and Perceptions
Understanding of consumer perceptions, attitudes and current behaviours regarding Agritourism

Relevance and Appeal
Relevance and appeal of different Agritourism propositions / offers / activities, understanding

Cultural Connection
Understanding connections to broader cultural and consumer trends [how Agritourism needs to align with sustainability, ethical consumerism, destination zero etc].

Segment Profiling
Market profiling of relevant customer segments

New Narratives
Identifying new narratives that can bring Agritourism propositions to life in new, compelling and culture-brand aligned ways

Competitor Learning
Understanding and learning from the competitor landscape [their offer, strategic positioning, maturity, etc]

Brand Connection
Connection between Agritourism, brand power, MDS framework

WHAT DID WE DO?

A MULTI PHASED APPROACH TO INSIGHT

- Category scan
- Category usage and Attitudes survey
- Behavioural data analysis
- Stakeholder interviews
- Trends review
- Category / competitor activity review
- Value proposition workshop
- Consumer and value proposition enrichment
- Concept screening

Agritourism Usage and Attitudes survey:

N=1000 Australian Travellers interviewed in May 2021 to understand current and future state of agritourism, Australian perceptions and understanding towards agritourism as well as how Tasmania's tourism offering and brand can play in this space.

Concept Screening:

4 concepts evaluated relative to a benchmark with n=500 Australian Travellers in Dec 2021 to identify the propositions that hold the strongest potential for TTAS in driving further visitation.

THE TARGET MARKET

IN SUMMARY

Agritourism represents a mass market opportunity. There are very low levels of rejection for agritourism activities and Tasmania. Seven in ten domestic travellers are potentially ‘in market’ for our offer.

Agritourism is a growing space with spend among domestic visitors continuing to increase. Consumer and cultural trends indicate that interest in Agritourism will continue to grow / strengthen, accelerated by the COVID pandemic.

We have identified three traveller segments in Agritourism, based on reasons for travel – Agritourism-first travellers, Destination-first travellers and On-the-go travellers.

How we activate against these groups requires specific strategies, experiences and packaging of our agritourism offer.

In terms of targeting these travellers, we need to be thinking ‘digital first’. The most common information sources when planning a holiday (and seeking out agritourism experiences) are search engines (60% mentioned this is a key information source); additionally social media channels are the 3rd most common information channel. Our targeting strategy must also consider ‘shareable’ content and stories, as word of mouth / referrals are the 2nd most common information source in this space.

INTRODUCING OUR AGRITOURIST SEGMENTS

AGRITOURISM-FIRST TRAVELLER

(35% OF AGRI-TOURISTS)

These travellers prioritise the agritourism experience when selecting a destination and are eager to engage in various related activities. Their trips are typically short, often limited to day or weekend excursions, focusing on connecting with the people who produce the goods they enjoy. Activating this group can be challenging due to Tasmania's location, but there may still be potential opportunities for intrastate travellers.

DESTINATION-FIRST TRAVELLER

(30% OF AGRI-TOURISTS)

Agritourism isn't the main reason this group travels; they select a destination first and then plan activities around it. They enjoy agritourism experiences but participate less frequently and are more inclined to take weekend trips. This segment is important for Tasmania, as targeted communication during the planning phase can affect their engagement with agritourism, as they seek suitable experiences to enjoy.

ON-THE GO TRAVELLER

(36% OF AGRI-TOURISTS)

These travellers make spontaneous decisions about agritourism activities and may not recognize their experiences as agritourism. They enjoy both weekend getaways and longer trips but have participated less in agritourism and show limited future interest. Additionally, they are less connected to Tasmania as a destination. The challenge is to enhance the attractiveness of agritourism options, making them more accessible and appealing for less engaged visitors.

EXPERIENCES ARE AN OPPORTUNITY

Overall, visiting café's/restaurants, farmers markets and alcoholic tours/tasting are the most popular agritourism experiences based on peoples past trips.

However, there is a gap in activities people are interested in versus those that they have participated in – in particular there appears to be unmet opportunities with farming tours, make your own experiences and cooking lessons with local produce. These represent an opportunity for local operators to capitalise on.

Lake Oberon, Western Arthur Range © Mark Reid

AUTHENTICITY IS KEY

THE UNDERLYING NEEDS AND MOTIVATIONS

There are a range of motivations and needs across different activities – achieving a sense of fun/ enjoyment with others is the most common motivation to talk to. Experiencing / discovering something new and ‘supporting local’ also play a key role in agritourism and can be highlighted to drive demand.

Authenticity is important in agritourism and underpins needs and motivations. The most important factor is to understand the story behind the products they are buying and to connect with the people behind the produce. Lean into this where possible and elevate the human narrative.

Mount Gnomon Farm © Jasper Da Seymour

PATRIOTISM AND RECOMMENDATION CAN UNLOCK OPPORTUNITY

Travelling in our own backyard has become a new norm. Our agritourists have strong tendency to support local business and local food/produce during their visits. Also, they welcome the idea of treating themselves with food/produce on their holiday. This indicates opportunity in our agritourism offer to create a “feel good” experience that promotes tasty local produce from café and restaurant to curated meals.

Recommendations are always an important touchpoint so developing great experiences is key, especially among our most popular experiences and for experiences Tasmania want to really own. New experiences and activities that support the local community are also activities that are more likely to be repeated and talked about.

LEVERAGE TASMANIA'S BRAND TO SUPPORT

Leverage Tasmania's branding, which already has strong ties to Agritourism.

Tasmania is viewed as the most 'different' destination brand within the context of agritourism. Our key strength lies in being a destination that offers travellers the ability to "slow down and enjoy" the agritourism offering.

Tasmania also stands out for its connection with nature, produce that is of superior quality and being good value for money. Amplify these in connection to your product/place/experience.

Key jobs to be done are building salience and activating against areas of brand strength.

We must also leverage the power of storytelling in how we bring our offer to market; bringing to life the voice and story of Tasmanian farms and produce.

KEY OPPORTUNITIES FOR TASMANIA

Cluster experiences: Create a unified offer by curating different activities to provide specific types of experiences, such as relaxing weekends. Hero agritourism experiences but strengthen and elevate with complementary non agri and agri offers e.g. pair wine trail with cheese, food, spas and activities.

Incorporate agri elements in non-agri spaces: Consumers look for agritourism elements in urban spaces and food, as well as in other experiences like slow food and sustainability. Integrate elements from the broader Tasmanian brand image to differentiate agritourism experiences and enhance the Tasmanian image. Use digital and urban spaces as touchpoints for agritourism experiences.

Tell cultural stories through agri: Elevate food experiences by connecting them to the unique stories and culture of the land and its people. Agribusinesses have the opportunity to tell historical stories through food, physical spaces, and accommodation. Linking to indigenous and colonial history will not only elevate the experience but also differentiate them globally and regionally

Build a safe bubble to explore the outdoors: Offer experiences that allow people to travel unplugged, go off the grid, and immerse themselves in nature while feeling safe and secure. Immersing people in a different, slow living style, connecting them with local communities and small batch items, and offering unique experiences that cannot be replicated elsewhere.