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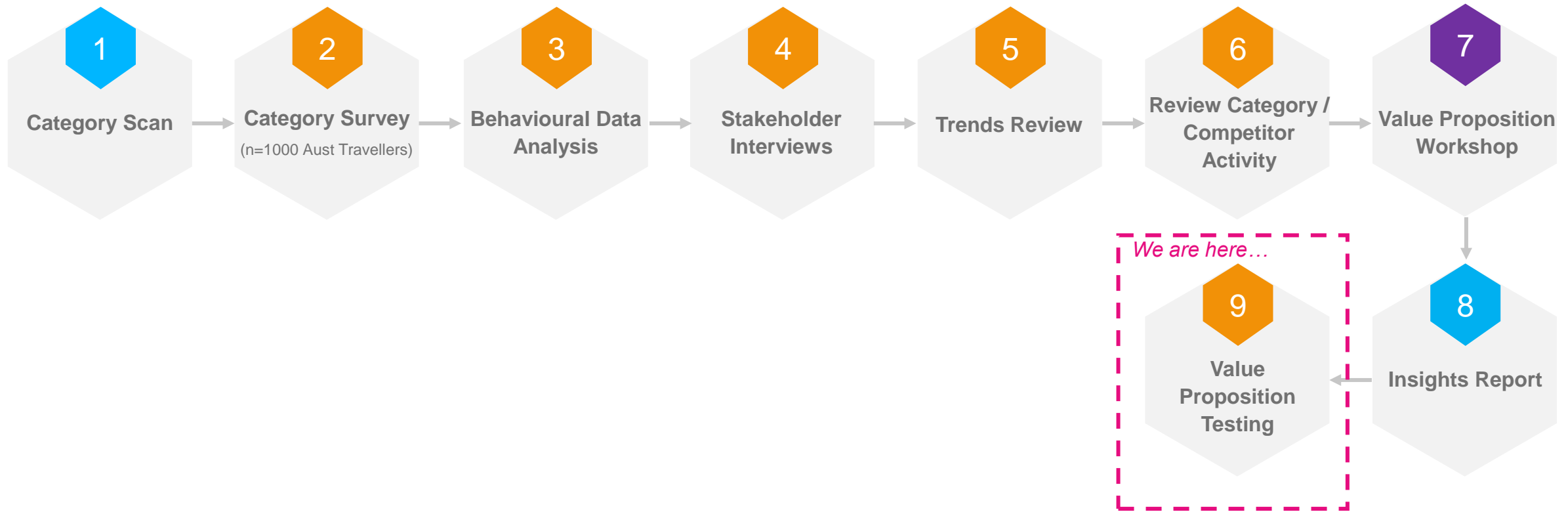
Agritourism Research Report

February 2022



Agritourism insights program

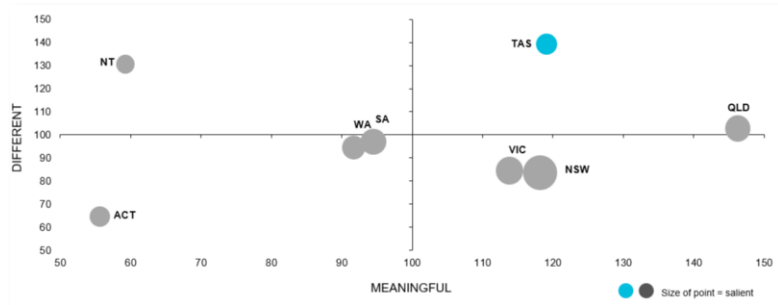
An insights program to guide the development of the Tasmanian (and regional) Agritourism strategy



What have we learnt so far about agritourism?

1. Brand Positioning

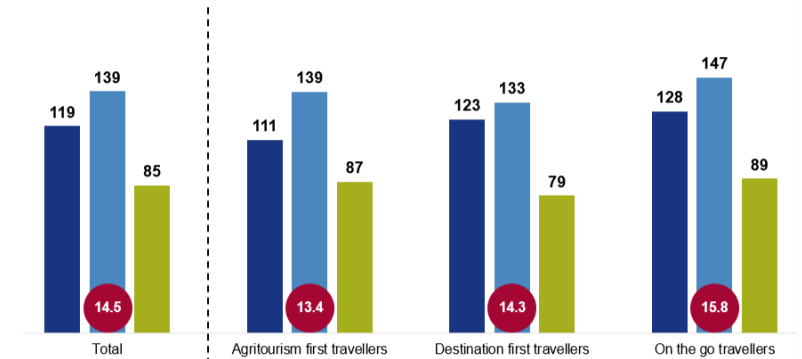
We have a strong meaningfully different brand; in prime position to lead growth in the Agritourism space...



Tasmania is known specifically for the hunting / fishing experience, followed by curated meals and 'make your own' experiences



Our equity for agritourism is strongest amongst on-the-go travellers - one of our key focuses for the market development consultations



2. Usage / Intent of Agritourism Activities



AGRITOURISM ACTIVITIES DIFFER IN POPULARITY AND ENGAGEMENT

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

In Tasmania specifically, past agritourism experiences are more typically at **cafes/restaurants**, **markets** and **tours of colonial heritage farming**



AGRITOURIST SPEND, TRIP LENGTH, AND REASON FOR TRAVEL VARIES ACROSS EXPERIENCES

In terms of spend, our **higher ticket agritourism experiences** are **'make your own' experiences**, farm stays, and indigenous heritage tours. However, these activities typically are **less appealing**

Experiences like visiting a **café/restaurant** or **alcoholic tours/tasting** have **broader appeal** despite lower average spend per person

People tend to **spend more on new experiences** they have not tried before (with these activities consistently having the highest average spend)



THERE IS AN OPPORTUNITY TO CAPITALISE ON UNTAPPED INTEREST FOR SOME AGRITOURISM ACTIVITIES

There is a gap in activities people are interested in versus those that they have participated in – in particular **farming tours**, **make your own experiences** and **cooking lessons** with local produce

Phase 1 of Agritourism research divided travellers into 3 segments...

REASON TO TRAVEL



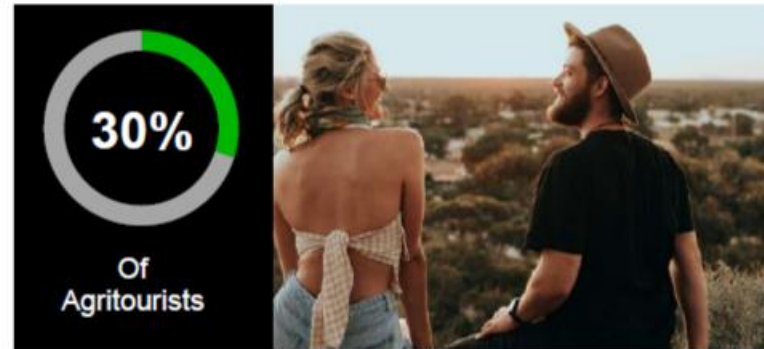
Agritourism-first traveller

These travellers decide on the experience they want to have before choosing a destination. The agritourism experience is the focal point of the whole trip. They have participated a wide range of agritourism activities and are willing to experience more. This is an opportunity segment when activating for certain experiences and types of trip.

Trips are much shorter among this group as they tend to go for day trips and occasionally weekend trips.

It's all about meeting the people behind the produce they enjoy as it is an important element of an *authentic* experience for them.

Due to Tasmania's geographical location, this is a tougher group to activate against as travellers stay in Tasmania for longer although there are still some opportunities present with this engaged segment. Is there an opportunity here for intrastate travellers?



Destination-first traveller

Agritourism is not necessarily the primary reason for travel for this group, they chose a destination first and then plan their experiences around this.

They love to participate in different agritourism activities but at a lower frequency

They are more likely to take a weekend trip.

This is a target segment of interest for Tasmania as well directed comms and engagement in the planning stages can influence their behaviour and engagement with Agritourism. They are willing to engage, but they are just looking for the right experiences to engage with.



On-the go traveller

These travellers decide in the moment on what agritourism experiences to engage with and are unlikely to view their experiences as Agritourism based altogether.

They are not only fond of weekend trips but also willing to take trips that are longer than a week.

Meanwhile, not only haven't they participate in various agritourism activities, but they also have less future intention. Additionally these travellers are less engaged with Tasmania as a destination

For this group, our challenge is to increase the appeal of our agritourism offerings; making them more readily available, easily accessible and ensuring the experience is communicated in a way that is appealing to the less engaged agritourist.

Optimising Agritourism in Tasmania – key objectives & research questions

Overall, there is a desire to optimise the agritourism proposition in Tasmania in order to drive further visitation. The key objective of this study is to identify the propositions that hold the strongest potential for TTAS in driving this visitation.

Other objectives included:

- Which ideas have the strongest appeal and impact on consumers' likelihood of visiting Tasmania?
- What is the priority content that is essential when communicating Agritourism? Is there anything that people think is missing?
- Who does the proposition resonate with the most? What elements resonate most with specific audiences?
- What emotions do they convey, and how might they impact the brand positioning of Tasmania as a destination



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Research Framework

Research design and sampling

This study evaluates four concepts in terms of how well they are received by an audience of target consumers

Methodology

- 15 minute online survey
- Fieldwork: 3rd –9th December 2021

Target sample

- Total n= 506
- Males/Females
- 18 years old+
- All states nationally excluding Tasmania

Qualifying criteria

- Routine holiday takers in AUS/NZ (at least every 2 years)
- Non-rejectors of agritourism activities
- Non-rejectors of Tasmania

Concept evaluation

Respondents see all 5 concepts:

Test concepts	
Core Proposition	Island of abundance
Pillar 1	Fields of abundance
Pillar 2	Valleys of abundance
Pillar 3	Oceans of abundance
Pillar 4	Abundance of makers

Concept performance is benchmarked against comparative metrics from the **2019 Self-Drive Concept Test**: uniqueness, appeal, relevance, believability and excitement. A straight average of results across the concepts from this test was used as basis for the norm.

Concept diagnostics and performance evaluation

Part 1: Concept Module

Respondents see one concept and provide responses to:

Concept diagnostics

- Appeal
- Uniqueness
- Relevance
- Excitement
- Clarity
- Believability

Brand Diagnostics

- Brand imagery
- Brand fit
- Brand impact
- Impact on visitation

All respondents respond to all concepts:

Total ranked preference

- Pillar ranking
- Fit with core value proposition

Performance benchmarked vs Self Drive 2019, significant difference at 95% confidence interval the KPI of success

Performance based on best overall ranked result

Part 2: Needscope Module

All respondents respond to all concepts:

Needscope Tester

Core Proposition

- Gratification
- Personality

Pillars

- Gratification
- Personality

The Concepts

Test concepts				
Core Proposition	Pillar 1	Pillar 2	Pillar 3	Pillar 4
Island of Abundance	Fields of abundance	Valleys of abundance	Oceans of abundance	Abundance of makers
<p>Connecting with the people and land for a quality experience</p> <p>Post COVID, people are yearning to travel to places where they can slow down, connect with nature, enjoy quality product and find a sense of community in a safe way</p> <p>Tasmania is a safe harbour. It is accessible, yet still replicates a feeling of 'going somewhere new' to an island offering plentiful of nature, home grown items, small communities and solitude – slow down & have authentic connections</p>	<p>Fertile valleys bursting with produce</p> <ul style="list-style-type: none"> • Biggest lavender field in the southern hemisphere • Pretty and gorgeous tulips • Bounties from the land – honey, truffles, berries, cheese, grains, chocolate, apples, grapes, olives, beef. • Grapes of pleasure - Tamar valley wine region 	<p>Memories in a bottle</p> <ul style="list-style-type: none"> • Mecca of sparkling wine • Distil your own whisky in the wilderness • Gin making • Apple and cider tours and tastings • Cool climate wines • Cellar doors – meet the makers • Micro breweries using local hops 	<p>The most pristine ocean and air</p> <ul style="list-style-type: none"> • Fresh produce from the sea and land – seafood (oysters, mussels, salmon), honey, grapes, olives, cherries. • Freshest air in the world • Paddock to plate with matching wine • Abundance of breathtaking coastlines • Catch your own seafood, pair with wine • Walk through small fishing towns 	<p>Meet the makers of our paddock to plate</p> <ul style="list-style-type: none"> • Explore diverse range of produce through tasting trails. • Meet producers big and small and hear their stories. • Some of the most fertile agricultural regions in Australia which means plentiful of fresh, delicious produce.

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Diagnostic Results – Core Proposition

The Core 'Island of Abundance' proposition is significantly more appealing than the 2019 Self Drive concept which also scored strongly. However, believability is a bit softer overall – suggesting that there is some scepticism that these experiences reflect reality.

Core Proposition



Connecting with the people and land for a quality experience

Post COVID, people are yearning to travel to places where they can slow down, connect with nature, enjoy quality product and find a sense of community in a safe way

Tasmania is a safe harbour. It is accessible, yet still replicates a feeling of 'going somewhere new' to an island offering plentiful of nature, home grown items, small communities and solitude – slow down & have authentic connections

Concepts' Diagnostic Summary

	Norm* (2019 Self Drive Avg.)	Island of Abundance
	<i>Base n=</i>	
		506
Impact on visitation (T2B)	N/A	55
Uniqueness (T2B)	41	40
Appeal (T3B)	78	82
Relevance (T2B)	50	49
Understanding (T3B)	N/A	80
Believability (TB)	48	41
Excitement (T2B)	80	80
Brand fit (T2B)	N/A	80
Brand impact (T2B)	N/A	67

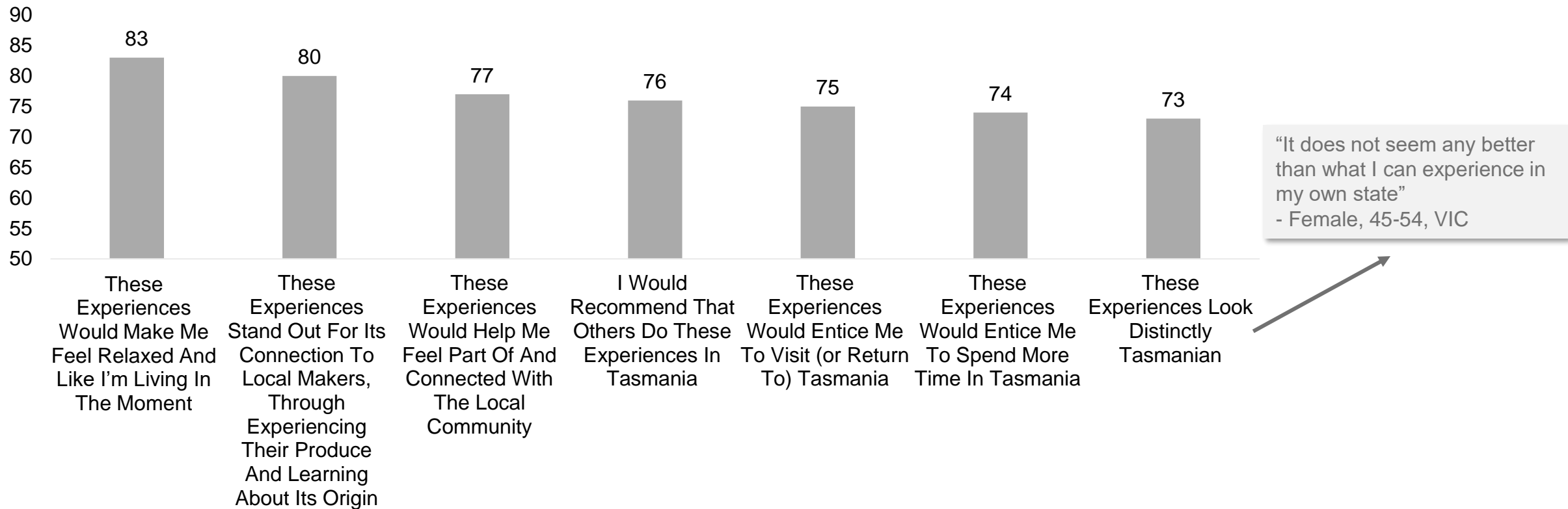
Note: Scepticism here is driven more by younger travellers (18-34) and those who haven't visited Tasmania previously. These groups require more proof points to buy into Tasmania's agritourism proposition.

The core proposition is first and foremost viewed as helping Australians feel relaxed while also standing out for its connection to local makers. Notably, the lowest association is that this proposition is distinctly Tasmanian in nature.

Core Proposition



Imagery Associations (% Agree) – Core Proposition



Despite the intended focus on agritourism, when asked what they like about the core proposition *nature* comes out most often. This is indicative of the intuitive connection between Tasmania and nature, but also asks whether we can be more explicit in communicating the food dimension.



Likes – Core Proposition

1st Nature

“It is different because you get an opportunity to **connect with nature**.” Female, 45-54, SA



“The slower pace and the ability to **enjoy natural beauty**.” Female, 25-34, VIC

“I love the idea of **nature**, exploring **beautiful scenery** where it is peaceful and being able to pick your own food.” Male, 35-44, VIC

2nd Food

“It's all about the **produce**” Male, 65-74, NSW



“**Organic and local produce** that are accessible to tourists/visitors ” Female, 18-24, NSW

“Plenty of **local produce** to taste and sample” Male, 55-64, WA

3rd Experience

“**Peaceful calm living** learning new things connecting with new people and their **heritage and solitude**.” Female, 45-54, NSW

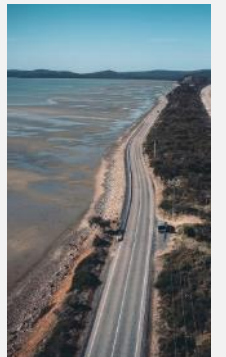


“the experience of **traveling but still in familiar area** without being too far from home” Male, 25-34, VIC

“**Meeting the locals** and other travellers that have the **same outlook on life as I do**.” Male, 65-74, QLD

4th Travel Mode

“The scenery a wonderful **driving experience**.” Female, 65-74, SA



“Tasmania is **easy to get around**. I can drive my **car** and use the **ferry**, I can take a **tour**, or **hire a car**.” Female, 65-74, VIC

Travellers liked a number of the images within the core proposition. In terms of the copy, 'quality experience' and 'safe harbour' are key words that resonate.

Core Proposition



Clickspot Likes – Core Proposition

TASMANIA: AN ISLAND OF ABUNDANCE



Connecting with the people and land for a quality experience

Post COVID, people are yearning to travel to places where they can slow down, connect with nature, enjoy quality product and find a sense of community in a safe way

Tasmania is a safe harbour. It is accessible, yet still replicates a feeling of 'going somewhere new' to an island offering plentiful of nature, home grown items, small communities and solitude – slow down & have authentic connections

Clickspot Heatmap

TASMANIA: AN ISLAND OF ABUNDANCE



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Other than the copy, the field of tulips, oyster tasting and animal petting were the most liked images.

Core Proposition



Clickspot Likes – Core Proposition

Clickspot % of Clicks

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While the majority of travellers had nothing to dislike about the proposition, the key suggestions related to visualising a more holistic holiday experience. This means including imagery of elements tangential to an agritourism holiday, such as more diverse activities and accommodation experiences.



Dislikes & Suggestions – Core Proposition

Dislikes

70% of Australians had nothing to dislike, the remaining 30% referenced a few themes:

Activities

“A bit **too food focused - doesn't mention hikes**”

Female, 45-54, VIC, Been to TAS

Restaurants

“Not very much focused on **landmarks** and **cafes**”

Male, 18-24, VIC, Been to TAS

Accommodation

“I'd need a nice modern resort or a hotel to stay in”

Female, 18-24, VIC, Been to TAS

Not for me / lack of excitement

“It seems **very niche** and only targeted towards people that would like a **slow leisure holiday**”

Female, 25-34, NSW, Been to TAS

Suggestions

1. Diverse Activities

Travellers mention liking to bundle their holiday together with other activities which aren't illustrated, such as hiking, riding, camping, wildlife experiences and restaurants. Some of these are included in our pillars, can we dial them up in our overall proposition?



2. Accommodation

For many travellers where they stay is an integral part of their trip. Can we better integrate tiny houses / cottage / farm stay visuals into our proposition?



Only a small number of dislikes come through overall (788 dislike clicks vs 2156 like clicks), with the abalone and nuts imagery having more dislikes than likes.

Core Proposition



Clickspot Dislikes – Core Proposition

Clickspot % of Clicks

TASMANIA: AN ISLAND OF ABUNDANCE

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The core 'Island of Abundance' proposition is most appealing amongst females and younger Australians. Appeal and excitement is slightly higher for destination-first travellers, suggesting a role for more explicitly promoting agritourism during the planning process.

Subgroup profile – Core Proposition	Total	Male	Female	18-44	45+	Proxy Erudite	Proxy Raw Urbanite	Agritourism first travellers	Destination first travellers	On-the-go travellers	Low Income (0-39K)	Middle Income (40-99K)	High Income (100K+)
Base n=	506	214	288	255	251	392	408	130	180	176	117	203	152
Appeal (T3B)	82	78	87	90	76	85	84	85	87	77	83	79	88
Uniqueness (T2B)	40	39	40	44	35	43	40	51	39	34	34	37	49
Relevance (T2B)	49	45	52	56	42	51	50	55	53	41	41	47	59
Excitement (T2B)	80	78	81	84	74	81	80	82	84	74	75	79	86
Clarity (T2B)	43	45	42	45	42	46	44	53	43	39	32	41	57
Believability (TB)	41	38	43	39	43	46	44	44	37	44	40	40	46
Brand fit (T2B)	80	79	81	82	79	82	81	84	81	78	80	81	84
Brand impact (T2B)	67	70	66	71	63	71	70	70	71	64	64	67	74
Impact on visitation (T2B)	55	54	55	59	50	47	57	61	58	57	60	56	51

■ Sig. higher than Total



From a location standpoint, 'Island of Abundance' is most appealing to those in NSW and most unique for Queenslanders. Those who have visited Tasmania previously have a clearer understanding of the proposition, while there was more ambiguity with those who hadn't visited prior.





Subgroup profile – Core Proposition	Total	NSW	Victoria	Queensland	Other States (WA, SA, ACT, NT)	Previously Visited TAS	Not Previously Visited TAS
<i>Base n=</i>	506	143	144	116	103	273	233
Appeal (T3B)	82	86	83	80	82	82	83
Uniqueness (T2B)	40	41	38	47	33	41	38
Relevance (T2B)	49	50	51	48	46	53	44
Excitement (T2B)	80	83	77	82	74	77	82
Clarity (T2B)	43	48	46	41	37	51	35
Believability (TB)	41	40	38	47	40	45	36
Brand fit (T2B)	80	83	81	79	77	83	77
Brand impact (T2B)	67	73	60	72	65	67	68
Impact on visitation (T2B)	55	57	47	59	56	53	56

Sig. higher than Total

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Diagnostic Results – Pillars

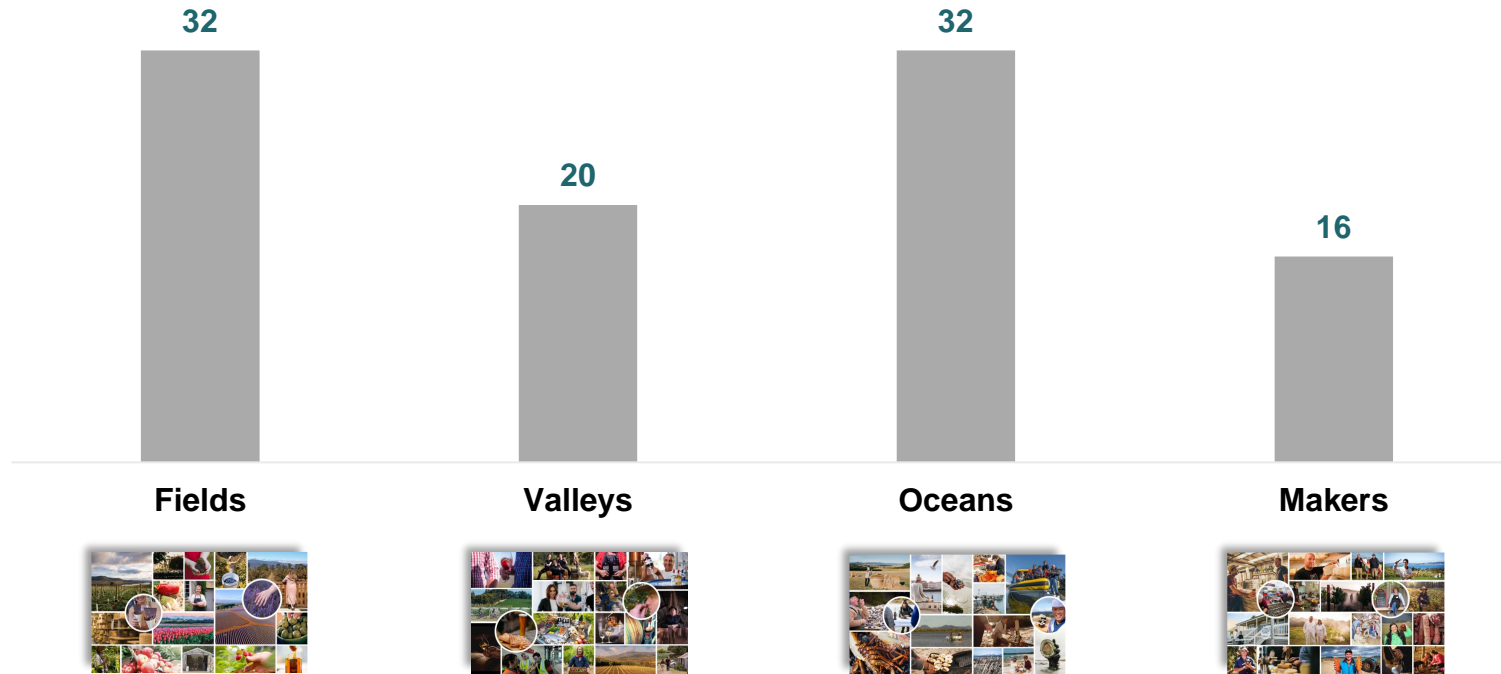
All four of the Pillars are both appealing and relevant propositions, in line with results from 2019 Self Drive. 'Fields' does stand ahead of the rest across both metrics, while Valleys scores slightly lower.

Concepts' Diagnostic Summary	Norm (2019 Self Drive Avg.)	Island of Abundance				
			Fields	Valleys	Oceans	Makers
	Base n=	506	506	506	506	506
Appeal (T3B)	78	82	84	75	78	78
Relevance (T2B)	50	49	57	49	54	52

Note: While Fields is overall most appealing, amongst **agritourism-first travellers** it's quite **even** between Fields, Valleys and Oceans. This suggests these agri-focussed travellers value the variety of options available. It also highlights that **Fields** is most effective amongst **destination-first travellers**.

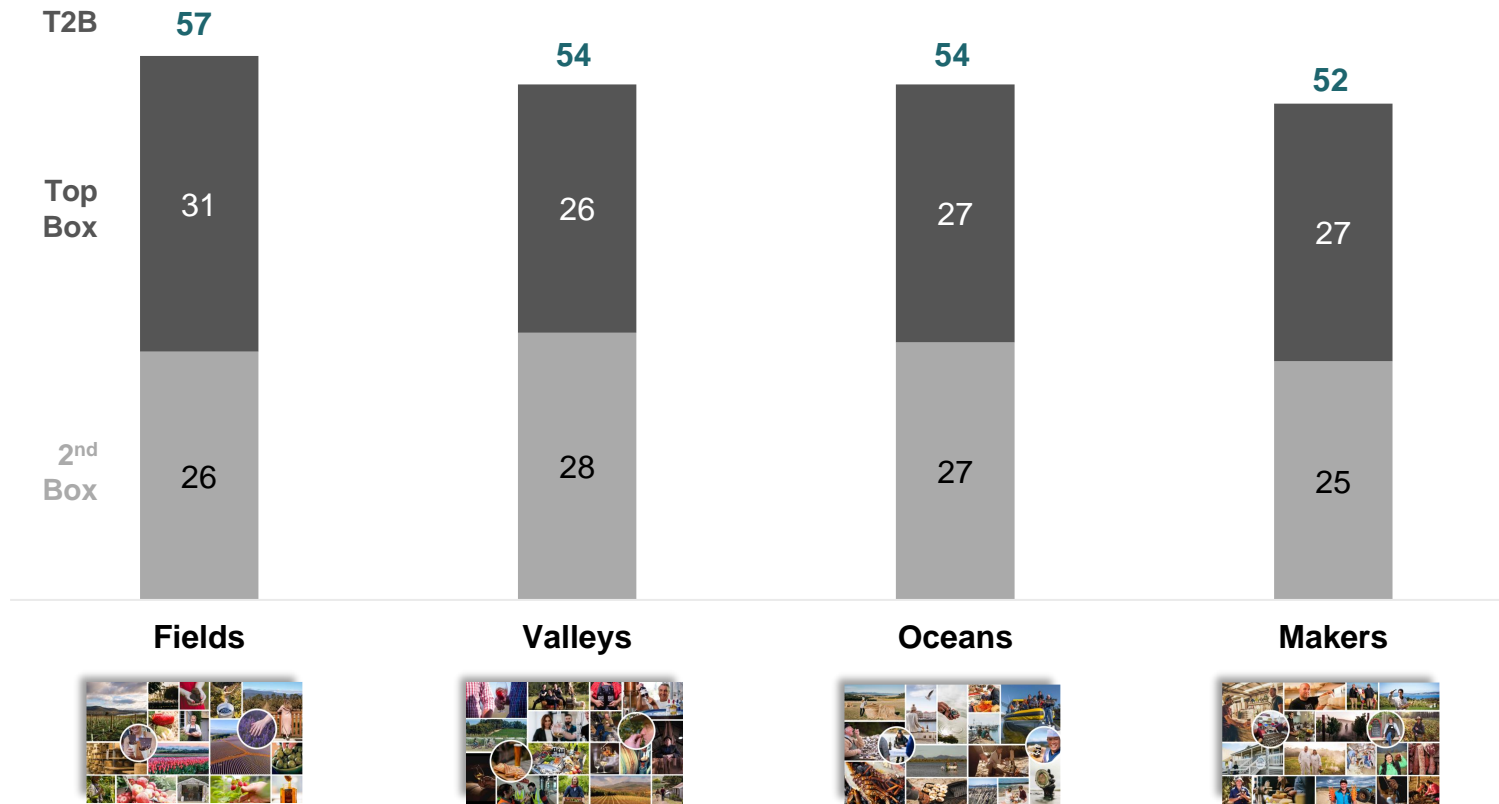
While Fields has strongest overall appeal, an equal number of people rank Oceans in 1st place in terms of likeability - suggesting a smaller but vocal group of enthusiasts for this proposition

Likeability (% who ranked 1st) - Pillars



The fit with the core proposition is strongest for 'Fields', with the similar images of lavender, produce and fruit picking creating more of a clear connection here.

Fit with Core Value Proposition - Pillars



Note: Fit with the Core Proposition is stronger amongst on-the-go travellers (31% top-box average) relative to agritourism-first travellers (26% top-box average).

Each pillar has its own clear associations, meaning they are all perceived as differentiated experiences within the broader umbrella of agritourism. ‘Learning’ comes through for all pillars except for valleys, which may suggest a potential link to the new regenerative tourism platform.

Fit with Agritourism Activities - Pillars

Fields



Valleys



Oceans



Makers



Similar to the core proposition, travellers like Fields most for the fields of tulips and lavender, alongside the fresh fruit picking experience.



Clickspot – Fields

Clickspot % of Clicks

TASMANIA: FIELDS OF ABUNDANCE

TASMANIA: FIELDS OF ABUNDANCE



Fertile valleys bursting with produce

- Biggest lavender field in the southern hemisphere
- Pretty and gorgeous tulips
- Bounties from the land – honey, truffles, berries, cheese, grains, chocolate, apples, grapes, olives, beef.
- Grapes of pleasure - Tamar valley wine region



Fertile valleys bursting with produce

- Biggest lavender field in the southern hemisphere **11%**
- Pretty and gorgeous tulips
- Bounties from the land – honey, truffles, berries, cheese, grains, chocolate, apples, grapes, olives, beef.
- Grapes of pleasure - Tamar valley wine region



Similar to the core proposition, females and younger Australians find Fields most appealing overall. A low percentage of males rank this as their top pillar of the four, instead skewing towards Oceans.

Subgroup profile – Fields	Total	Male	Female	18-44	45+	Proxy Erudite	Proxy Raw Urbanite	Agritourism first travellers	Destination first travellers	On-the-go travellers	Low Income (0-39K)	Middle Income (40-99K)	High Income (100K+)
Base n=	506	214	288	255	251	392	408	130	180	176	117	203	152
Appeal (T3B)	84	79	89	87	82	86	86	84	87	83	88	82	86
Relevance (T2B)	57	52	61	62	53	61	59	62	58	55	55	55	66
Fit with value proposition (T2B)	57	53	58	54	59	61	60	43	56	66	56	56	59
Ranked as top pillar	32	22	39	39	25	32	33	28	38	27	38	29	30

■ Sig. higher than Total



There is similar appeal for Fields based on location, although is slightly higher amongst those who haven't visited Tasmania before – indicating that this could be the proposition to lure new travellers to the state.

Subgroup profile – Fields	Total	NSW	Victoria	Queensland	Other States (WA, SA, ACT, NT)	Previously Visited TAS	Not Previously Visited TAS
Base n=	506	143	144	116	103	273	233
Appeal (T3B)	84	83	86	85	82	82	87
Relevance (T2B)	57	55	56	62	57	60	54
Fit with value proposition (T2B)	57	60	51	59	57	55	58
Ranked as top pillar	32	35	38	25	29	33	32

■ Sig. higher than Total

The most enjoyable scenes in Valleys are the picnic platter followed by winery shots and the beer/jaffle illustration.

Valleys



Clickspot – Valleys

Clickspot % of Clicks

TASMANIA: VALLEYS OF ABUNDANCE

TASMANIA: VALLEYS OF ABUNDANCE



Memories in a bottle

- Mecca of sparkling wine
- Distil your own whisky in the wilderness
- Gin making
- Apple and cider tours and tastings
- Cool climate wines
- Cellar doors – meet the makers
- Micro breweries using local hops



10%

Memories in a bottle

- Mecca of sparkling wine
- Distil your own whisky in the wilderness
- Gin making
- Apple and cider tours and tastings
- Cool climate wines
- Cellar doors – meet the makers
- Micro breweries using local hops



While at a total level Valleys is viewed as less relevant than the other propositions, Agritourism first travellers find it equally relevant as well as most appealing – likely due to the more explicit inclusion of food & wine related imagery. This suggests that Valleys could be most effective when communicating tactically to existing agritourism travellers.

Subgroup profile – Valleys	Total	Male	Female	18-44	45+	Proxy Erudite	Proxy Raw Urbanite	Agritourism first travellers	Destination first travellers	On-the-go travellers	Low Income (0-39K)	Middle Income (40-99K)	High Income (100K+)
Base n=	506	214	288	255	251	392	408	130	180	176	117	203	152
Appeal (T3B)	75	75	75	80	70	75	74	85	79	65	74	76	79
Relevance (T2B)	49	49	50	54	45	53	49	60	53	39	47	47	59
Fit with value proposition (T2B)	54	51	57	49	59	60	57	45	56	60	53	52	58
Ranked as top pillar	20	21	19	19	20	19	19	25	18	17	18	20	21

■ Sig. higher than Total



Appeal in Queensland is particularly strong for Valleys, likely due to the relative lack of wineries in that state compared with Victoria and New South Wales, making it a more relevant and differentiated experience.

Subgroup profile – Valleys	Total	NSW	Victoria	Queensland	Other States (WA, SA, ACT, NT)	Previously Visited TAS	Not Previously Visited TAS
Base n=	506	143	144	116	103	273	233
Appeal (T3B)	75	71	73	80	75	75	74
Relevance (T2B)	49	44	50	53	51	52	46
Fit with value proposition (T2B)	54	53	51	59	55	53	56
Ranked as top pillar	20	18	18	21	22	18	22

 Sig. higher than Total



The most appealing imagery in Oceans is the lobster and the fishing trip – combining a sense of good food with adventurism.

Clickspot – Oceans

Clickspot % of Clicks

TASMANIA: OCEANS OF ABUNDANCE



The most pristine ocean and air

- Fresh produce from the sea and land – seafood (oysters, mussels, salmon), honey, grapes, olives, cherries.
- Freshest air in the world
- Paddock to plate with matching wine
- Abundance of breathtaking coastlines
- Catch your own seafood, pair with wine
- Walk through small fishing towns

TASMANIA: OCEANS OF ABUNDANCE



12%

The most pristine ocean and air

- Fresh produce from the sea and land – seafood (oysters, mussels, salmon), honey, grapes, olives, cherries.
- Freshest air in the world
- Paddock to plate with matching wine
- Abundance of breathtaking coastlines
- Catch your own seafood, pair with wine
- Walk through small fishing towns



Oceans stands apart amongst particular audiences – being more appealing for males (where all other pillars are higher or equal amongst females) and amongst the younger 18-44 group of travellers. 39% of males rank this as their top pillar, relative to the next highest at 22% for Fields.

Subgroup profile – Oceans	Total	Male	Female	18-44	45+	Proxy Erudite	Proxy Raw Urbanite	Agritourism first travellers	Destination first travellers	On-the-go travellers	Low Income (0-39K)	Middle Income (40-99K)	High Income (100K+)
Base n=	506	214	288	255	251	392	408	130	180	176	117	203	152
Appeal (T3B)	78	81	77	85	72	78	78	82	83	74	77	78	82
Relevance (T2B)	54	55	53	58	50	55	53	62	56	49	51	54	60
Fit with value proposition (T2B)	54	55	53	51	57	59	58	42	52	67	54	55	53
Ranked as top pillar	32	39	28	30	35	31	30	32	33	34	28	34	34

Sig. higher than Total



Appeal is stronger here for those in Queensland and NSW, particularly relative to Victoria. Oceans is also quite strong amongst those who haven't been to Tasmania before, being the second strongest performer amongst this group behind Fields.

Subgroup profile – Oceans	Total	NSW	Victoria	Queensland	Other States (WA, SA, ACT, NT)	Previously Visited TAS	Not Previously Visited TAS
Base n=	506	143	144	116	103	273	233
Appeal (T3B)	78	82	72	79	81	78	79
Relevance (T2B)	54	52	54	58	52	56	52
Fit with value proposition (T2B)	54	56	51	53	57	54	54
Ranked as top pillar	32	35	29	32	34	31	34

■ Sig. higher than Total

Similar to Oceans, travellers here enjoy the imagery of fresh lobster. Following this, there are considerable likes for the beekeeping couple.



Clickspot – Makers

Clickspot % of Clicks

TASMANIA: ABUNDANCE OF MAKERS



Meet the makers of our paddock to plate

- Explore diverse range of produce through tasting trails.
- Meet producers big and small and hear their stories.
- Some of the most fertile agricultural regions in Australia which means plentiful of fresh, delicious produce.

TASMANIA: ABUNDANCE OF MAKERS



10%

Meet the makers of our paddock to plate

- Explore diverse range of produce through tasting trails.
- Meet producers big and small and hear their stories.
- Some of the most fertile agricultural regions in Australia which means plentiful of fresh, delicious produce.

This image has low likes and is hard to make out – maybe a bit of ambiguity?



While Makers has the lowest appeal of the pillars amongst 18-34 year olds it has quite strong relevance, indicating that with some optimisation it could be useful in attracting younger travellers to Tasmania. It may need to be positioned as more wild and less urban (i.e. a distinctly Tasmanian 'maker' experience) in order to attract these travellers.

Subgroup profile – Makers	Total	Male	Female	18-44	45+	Proxy Erudite	Proxy Raw Urbanite	Agritourism first travellers	Destination first travellers	On-the-go travellers	Low Income (0-39K)	Middle Income (40-99K)	High Income (100K+)
Base n=	506	214	288	255	251	392	408	130	180	176	117	203	152
Appeal (T3B)	78	76	79	82	74	79	78	81	82	73	78	78	81
Relevance (T2B)	52	47	56	57	47	53	52	60	55	47	50	48	63
Fit with value proposition (T2B)	52	49	54	50	55	57	57	45	52	59	53	53	51
Ranked as top pillar	16	18	15	13	19	17	17	15	11	22	16	17	16

Sig. higher than Total



Appeal for Makers doesn't vary too much between sub-groups. Ranking as top pillar is stronger however amongst those from Queensland, with New South Wales ranking it particularly low – potentially due to similar activities being more accessible in this state.

Subgroup profile – Makers	Total	NSW	Victoria	Queensland	Other States (WA, SA, ACT, NT)	Previously Visited TAS	Not Previously Visited TAS
Base n=	506	143	144	116	103	273	233
Appeal (T3B)	78	78	76	79	78	79	76
Relevance (T2B)	52	50	51	57	51	55	48
Fit with value proposition (T2B)	52	53	49	51	58	53	51
Ranked as top pillar	16	12	15	22	15	19	12

■ Sig. higher than Total

Core attributes: comparing them side by side we see a spectrum of emotion, with the core proposition closest to Tasmania's heartland, followed by "fields" and "makers", with "oceans" and "valleys" moving to more distinct territories

Island



Laid back, down to earth Calmed, mellow
 Caring, nurturing
 Quiet, gentle
Friendly, sociable
In harmony, balanced
 Peaceful, content

Fields



In harmony, balanced
 Peaceful, content
 Calmed, mellow
 Friendly, sociable
 Indulged, rewarded
 Cultured, discerning
 Inspiring

Makers



Positive, engaged
Friendly, sociable
 Calmed, mellow
 Cultured, discerning
 In harmony, balanced
 Inspiring, creative

Oceans



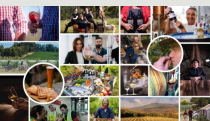




Full-of-life, optimistic
Friendly, sociable
 Caring, nurturing

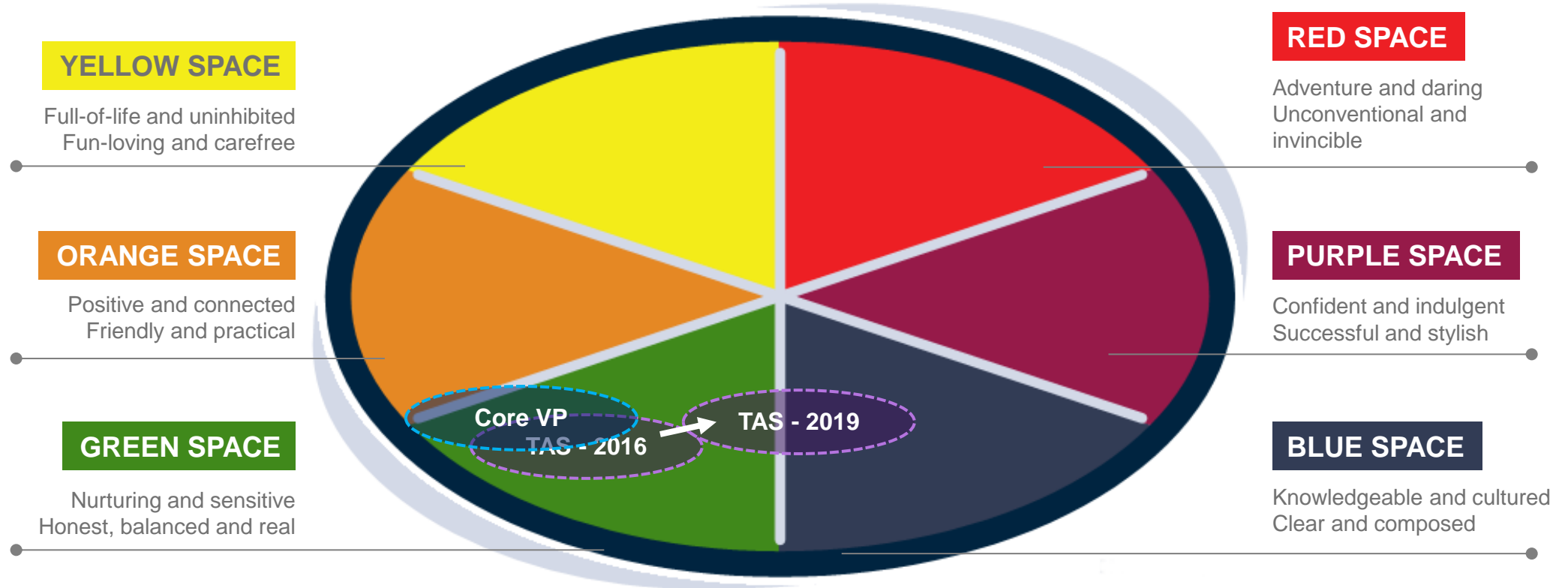
Valleys



Composed, poised
 Cultured, discerning
 Positive, engaged
 Friendly, sociable
 Indulged, rewarded
 Confident, self-assured

	Does it build back heartland emotion?	What does it deliver uniquely?	Tactical use	Strategic use
Core Proposition 	Strongly supports a move back to Green	Adds a level of <i>culture and discernment</i> to the 2016 brand position for Tasmania	Broadly applicable – can be used as the basis from which tactical comms can be rolled out	Supports longer term brand building ambition to moving back to green
Fields 	Yes - Supports a move back to Green, laddering to the core proposition	An amplified sense of <i>harmony and balance</i>	Day-to-day activations that talk to farm-based activities	Supports the core proposition
Valleys 	No – moves closer to Blue and Purple (Erudite territory)	An amplified sense of <i>composition and poise</i>	When we are talking about wine, or when we want to imbue a sense of premium-ness	Moves us away from the long term brand ambition – use tactically, or retool to target Green emotions
Oceans 	No – moves closer to Yellow (a more energetic and physical travel space)	An amplified sense of <i>sociability and optimism</i>	When we are talking about ocean-based activities, or when we want a shot of energy	Moves us away from the long term brand ambition – use tactically, or retool to target Green emotions
Makers 	Yes - Supports a move back to Green, laddering to the core proposition, but also with some Blue attributes	A smattering of <i>culture and discernment</i> and an amplified sense of <i>friendliness and positivity</i>	When we are talking craft, or when we want to amp up <i>culture and discernment</i> cues	Supports the core proposition

By integrating the Core Agritourism VP into Tasmania's overall perception, we will be supporting a back into the Green space



KANTAR

In summary...

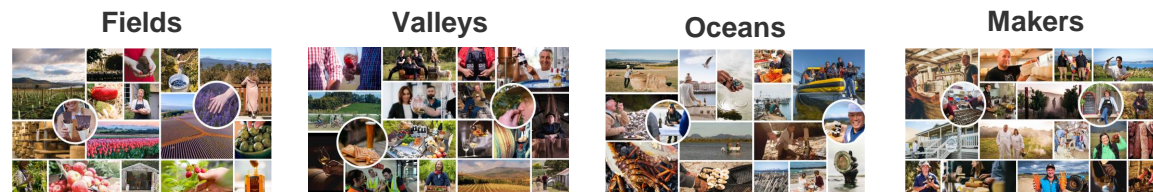


Playbook – Core Proposition

Islands of Abundance (Core Agritourism Value Proposition)

<p>What it's good at</p>	<ul style="list-style-type: none"> The core Agritourism proposition has strong appeal (scoring higher than Self Drive 2019) and high relevance for travellers. Implementation of this proposition strongly supports a move back into the Green space for the Tasmanian brand
<p>Limitations & Optimisations</p>	<ul style="list-style-type: none"> There's a lower degree of believability here, particularly amongst younger travellers and those who haven't visited Tasmania. There may be a role here to educate these travellers in regards to agritourism. Some travellers do prefer to visualise a holistic holiday experience, rather than just the agritourism elements. We should consider how we can combine some of the best tangential elements of a Tasmanian holiday (i.e. other activities such as hiking, restaurants, accommodation) into how we express the proposition. We could consider making some small adjustments to the imagery such as the abalone The experience isn't viewed by all as distinctly Tasmanian, particularly where there are activities that can be enjoyed in one's own state. We should consider how we package and communicate these activities to travellers from different states.
<p>When to use it</p>	<ul style="list-style-type: none"> The Core VP is broadly applicable: it can be used as the basis from which tactical comms are rolled out, or can be used strategically to support long-term brand building in the move back to Green It appeals more to females and younger travellers, so can be used as a hook to attract these travellers. Excitement is also higher for destination-first travellers – suggesting that it can be used to promote agritourism amongst those who have already decided on their destination.

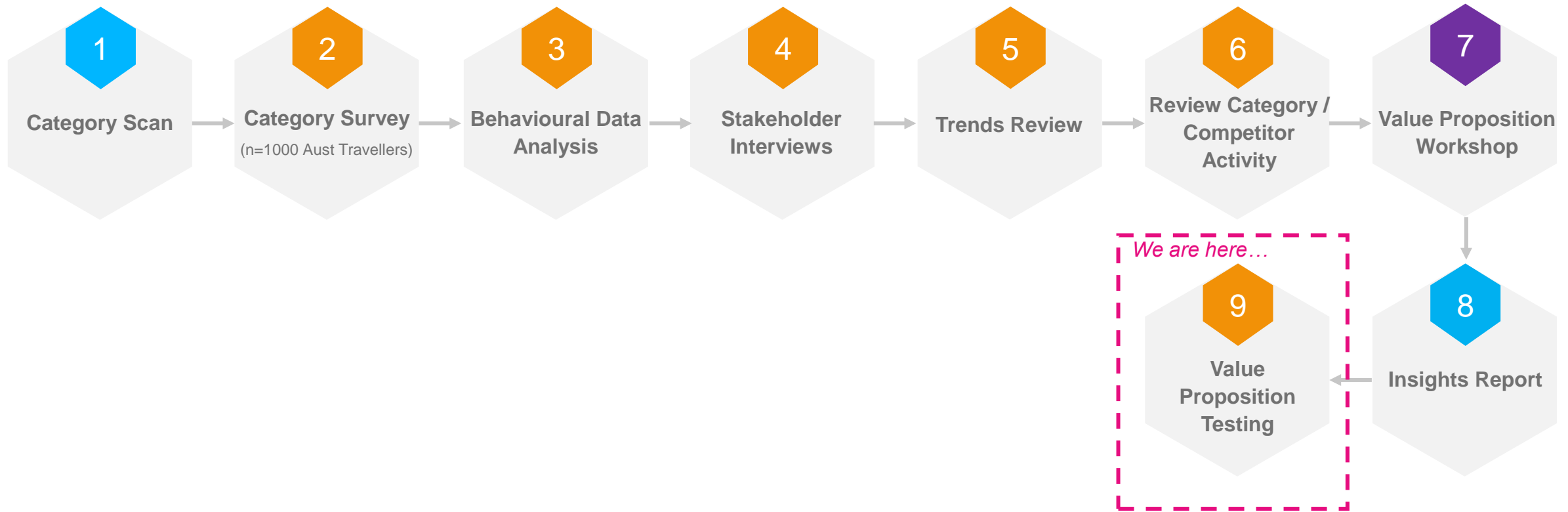
Playbook – Pillars



	Fields	Valleys	Oceans	Makers
What it's good at	<ul style="list-style-type: none"> The most appealing and relevant of all the pillars More appealing amongst destination-first travellers Strong fit with the Core V Supports a move back to Green, laddering to the core proposition 	<ul style="list-style-type: none"> While less relevant than the other pillars, it is equally relevant amongst agritourism-first travellers due to the more explicit inclusion of wine and food Stronger in the Queensland market 	<ul style="list-style-type: none"> Highly appealing amongst a smaller group of enthusiasts (males and those 18-44), those in Queensland and those who haven't visited Tasmania before. 	<ul style="list-style-type: none"> Supports a move back to Green, laddering to the core proposition, but also with some Blue attributes
Limitations & Optimisations		<ul style="list-style-type: none"> Moves us closer to Blue and Purple (Erudite territory). If we want to use strategically we should retool to target Green emotions. 	<ul style="list-style-type: none"> Moves us closer to Yellow (a more energetic and physical travel space). If we want to use strategically we should retool to target Green emotions. 	<ul style="list-style-type: none"> Lowest appeal amongst 18-24 year old's, but highest relevance. This suggests it may need to be positioned as more wild and less urban (i.e. a distinctly Tasmanian 'maker' experience) in order to attract these travellers.
When to use it	<ul style="list-style-type: none"> Can either be used to support the core proposition, or tactically through day-to-day activations which speak to farm-based activities. Fields is by far the most appealing proposition amongst on-the-go travellers - a key focus of our market development consultations 	<ul style="list-style-type: none"> We should only use Valleys tactically when talking about wine or when we want to imbue a sense of premium-ness. We can also use Valleys if speaking explicitly to agritourism-first travellers, especially those in Queensland. 	<ul style="list-style-type: none"> We should only use Oceans tactically when talking about ocean-based activities or when we want a shot of energy. We could also use Oceans tactically to appeal to key groups (males, 18-44, QLD) and particularly those who haven't been to Tasmania before. 	<ul style="list-style-type: none"> Can either be used to support the core proposition, or tactically when we are talking to craft or when we want to amp up <i>culture and discernment</i> cues.
Regions	North, East	North, East	South, East	South, West by North West

Next steps in the agritourism insights program...

An insights program to guide the development of the Tasmanian (and regional) Agritourism strategy



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THANK YOU



Tourism
Tasmania