Tasmania's Agritourism Value Proposition

Findings from research conducted May-June 2021

Purpose of the Agritourism research program

TTAS Strategic Goals:

01

Value proposition development [VPs to consider TAS as a whole + regions]

Note: This needs to include the specific Agritourism offer as well as have a clear linkage to Come Down For Air

02

Development of a consumer targeting and conversation strategy

Note: Identification of key customer 'segments', identifying critical messages and touchpoints

Overarching objectives of the Agritourism research program

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

Agritourism research program overview

A six month insights program to guide the development of the Tasmanian (and regional) Agritourism strategy

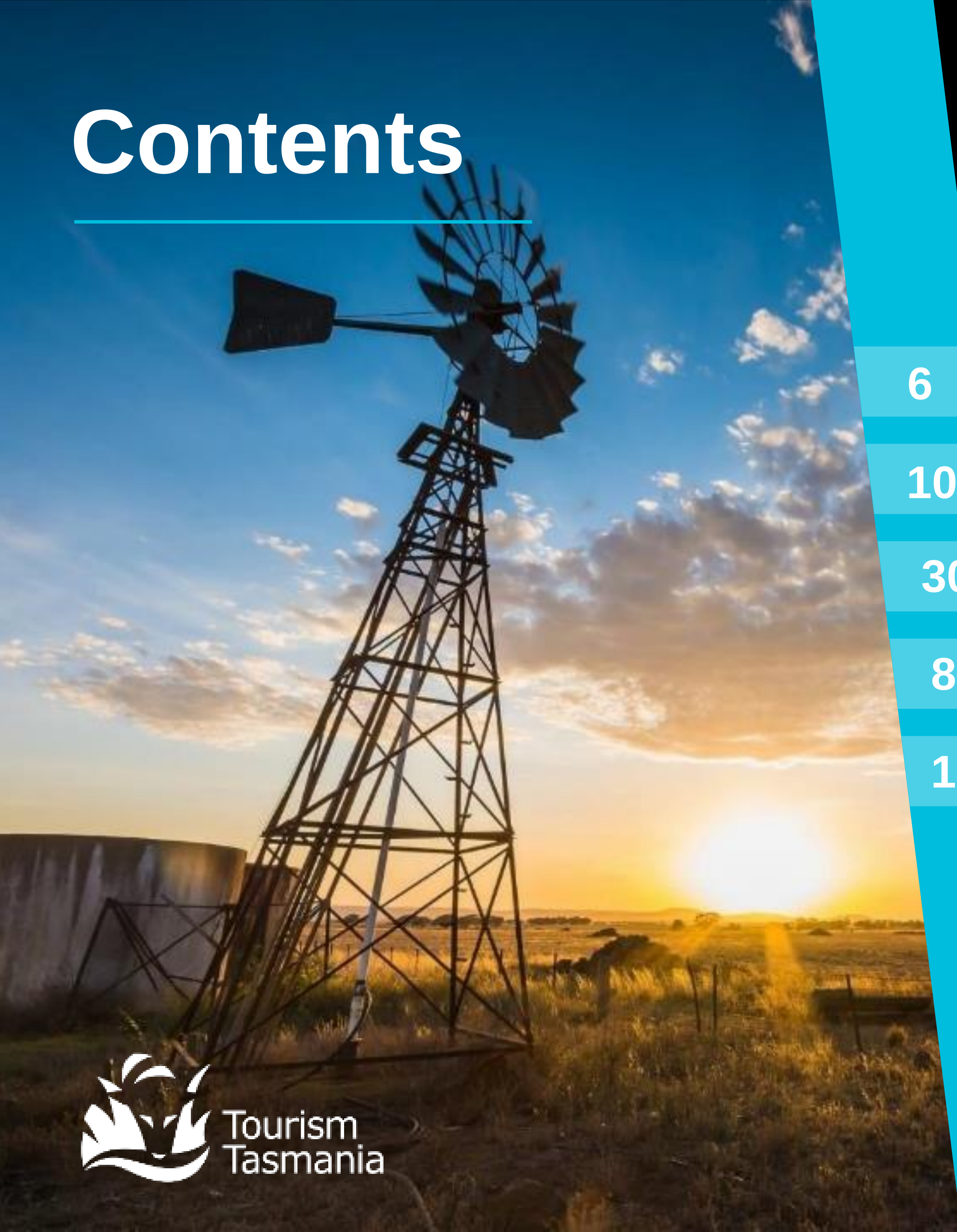
Contents of this document

This document contains all learnings and outcomes from the project to date. This includes:

- Findings from the Usage and Attitudes Survey
- Findings from stakeholder interviews
- Findings from the desk research components (trends and competitive activity)
- Workshop output
- Proposed value proposition for Tasmania’s Agritourism sector

As the core objective of this first stage of the project has been the development of proposed Value Propositions, the report leads with this outcome. The granular findings from each specific research component have been included in an appendix.

Contents



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Insights summary
(input for Value Proposition development)

Tourism Tasmania

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Insights Summary – Target Market

- Agritourism represents a mass market opportunity. There are very low levels of rejection for agritourism activities and Tasmania. 7 in 10 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.

Insights Summary – Interests and Motivations

Traveller Needs / Motivations

- There are a range of motivations and needs across the different activities –achieving a sense of fun/ enjoyment with others is most common motivation. Experiencing / discovering something new and 'supporting local' also play a key role in agritourism.
- 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.

Emerging Trends

- The COVID-19 pandemic has amplified and accelerated underlying trends which will drive increased interest and demand for agritourism experiences. In particular, related trends include:
  - Sustainability
  - Exploration and discovery
  - Connection with self and land

Activities

- 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.

Insights Summary – Positioning

- Tasmania has a strong brand in this space.
- Tasmania is viewed as the most 'different' destination brand within the context of agritourism. Our key strength lay in being a destination that offers travellers with the ability to "slow down and enjoy" through the agritourism offering. Tasmania also stands out for its connection with nature, produce that is of superior quality and being good value for money.
- 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 fields and produce.

Tasmania Agritourism Value Propositions (Proposed)

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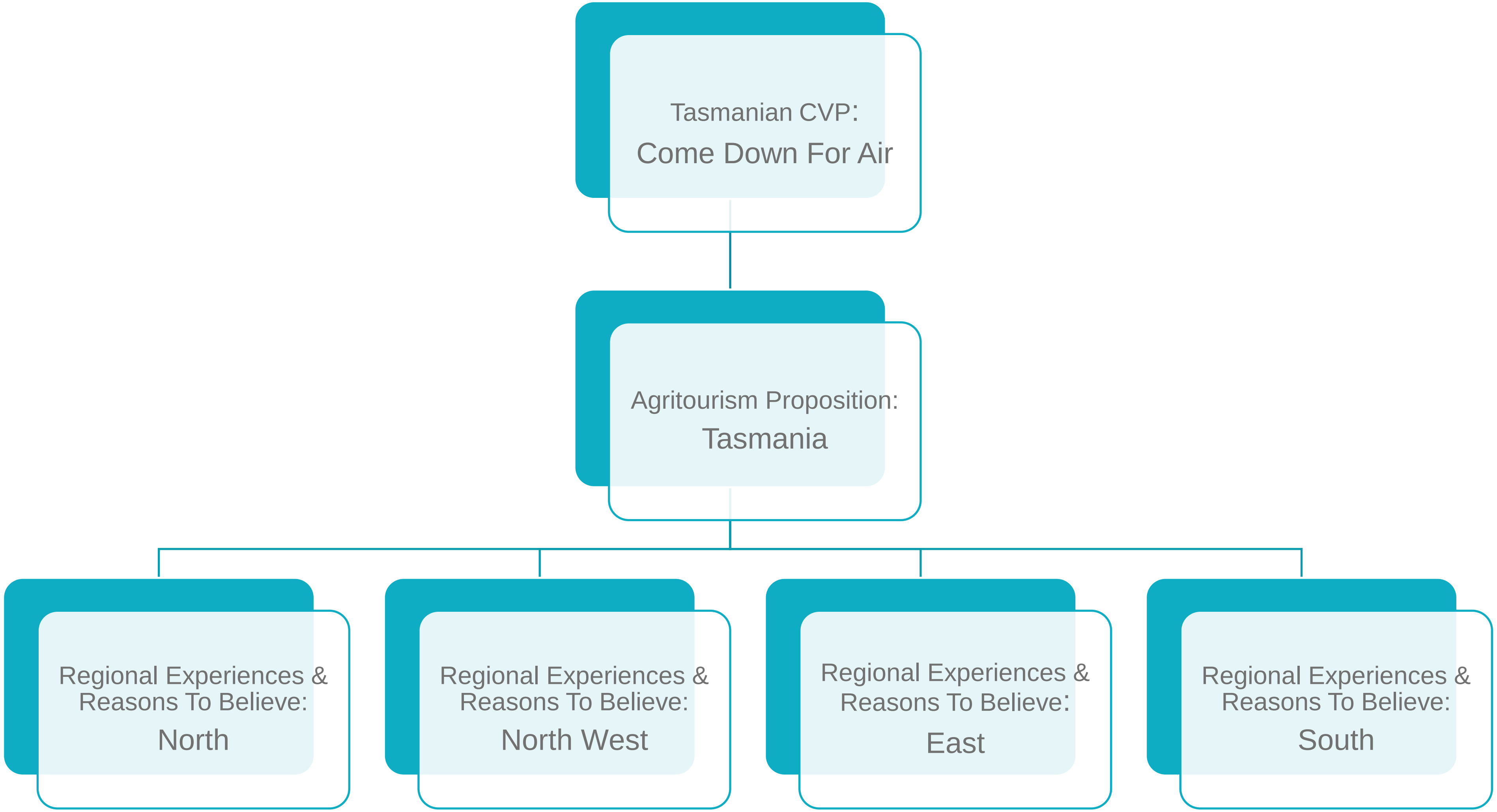
Value Proposition Structure



This section of the report proposes a number of potential Tasmanian Agritourism Propositions (with supporting Regional experiences and reasons to believe) which will input into Stage 2 of the project: Value Proposition Enrichment and Testing.

Tourism Tasmania

Come Down for Air

GOAL

Broaden Tasmania's appeal by playing like a culture brand, not just another tourist destination

INSIGHT

Modern city life strips the humanity out of people and makes them feel repressed and stressed

IDEA

Tasmania is the antidote to modern city life (a place where bohemian-at-the-heart can experience a more creative, vital existence… even if just for a moment)

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Proof Points by Region

TASMANIA
COME DOWN FOR AIR

NORTH

- European heritage / colonial farming
- Historic, convict narrative (romanticizing maverick, entrepreneurial archetype)
- Farms, meat and wine
- Established vineyards / touring
- Largest lavender farm in Southern Hemisphere

WEST BY NORTH WEST

- Fertile landscape (rich, red soil)
- Raw, unrefined landscape – embrace harsh weather
- More remote, fewer tourists – engage with authentic Tasmanians / locals
- Cradle to coast tasting trail
- Established dairy farming
- Wagyu beef
- Cheese (King Island Dairy)
- Tulips

SOUTH

- Cooking / hands-on experiences
- Cheese
- Apples / cider
- Salmon farming
- Fly fishing
- Distillery – gin, whisky (is there an indigenous ingredients story here; esp. gin?)

EAST

- Aligned to relaxation / chilled need state
- Historic townships – small communities / hands-on experiences, friendly locals
- Fishing ports – Bicheno and St Helens
- Where Tasmanians go on holiday
- Wine
- Oysters / fresh seafood
- Vineyards
- Walnuts

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TASMANIA
COME DOWN FOR AIR

BRAND PROPOSITION **Come Down for Air**

AGRITOURISM PROPOSITION **An Island of Abundance**

TASMANIA BRAND PROPOSITION | COME DOWN FOR AIR

GOAL | Broaden Tasmania's appeal by playing like a culture brand, not just another tourist destination	**INSIGHT** | Modern city life strips the humanity out of people and makes them feel repressed and stressed	**IDEA** | Tasmania is the antidote to modern city life (a place where bohemian-at-the-heart can experience a more creative, vital existence… even if just for a moment)

AGRITOURISM PROPOSITION | AN ISLAND OF ABUNDANCE

GOAL | Rediscover destinations in our own backyard. Make Tasmania feel far enough away that it feels like an exotic holiday, yet accessible enough to make it all worthwhile.	**INSIGHT** | Post COVID, people are yearning to travel to places where they can connect with nature, find a sense of community in a safe way	**IDEA** | Tasmania is a safe harbour. It is accessible, yet still replicates a feeling of 'going somewhere new' to an island offering nature, home grown items, small communities and solitude

REGIONAL EXPERIENCES AND REASONS TO BELIEVE

NORTH | FIELDS OF ABUNDANCE	SOUTH | ABUNDANCE OF CRAFT	EAST | OCEANS OF ABUNDANCE	WEST BY NORTH WEST|ABUNDANT WILDERNESS
Beauty in every corner • Biggest lavender field in the southern hemisphere • Berry fields to your hearts content – pick your own and real fruit ice cream	**Memories in a bottle** • Distil your own gin and whisky • Apple and cider tours and tasting	**Connect with communities in small fishing towns** • Walk through small fishing towns – learn about fishing traditions and farming • Seafood and wine pairing • Catch your own	**Forage through the wilderness** • Cooking course – find out how indigenous herbs can be fused with modern cooking techniques to add unique twists to traditional food • Learn about indigenous bush food recipes

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TASMANIA
COME DOWN FOR AIR


TASMANIA
COME DOWN FOR AIR

Global Experience Inspiration

Purple Haze organic lavender farm, Washington state

- Organic lavender ice cream and lemonade, homestay

Burnside Farms, Virginia

- Seasonal experiences e.g. tulip bulb plants, sunflower maze etc., pick your own and make your own

Other inspirations

- Subscription models e.g. pick your own, accommodation etc.

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TASMANIA
COME DOWN FOR AIR

BRAND PROPOSITION **Come Down for Air**

AGRITOURISM PROPOSITION **Uncover the Secret Gems of Tasmania**

TASMANIA BRAND PROPOSITION | COME DOWN FOR AIR

GOAL | Broaden Tasmania's appeal by playing like a culture brand, not just another tourist destination	**INSIGHT** | Modern city life strips the humanity out of people and makes them feel repressed and stressed	**IDEA** | Tasmania is the antidote to modern city life (a place where bohemian-at-the-heart can experience a more creative, vital existence… even if just for a moment)

AGRITOURISM PROPOSITION | UNCOVER THE SECRET GEMS OF TASMANIA

GOAL | Tasmania as a place to live an alternative lifestyle. Not a tourism experience but a life lived and loved by Tasmanians	**INSIGHT** | People don't want the same experience as all other tourists. They are looking for the lesser known gems – the things only locals do and know about.	**IDEA** | Tasmania has a lot of 'quiet beauties' only locals enjoy. Live the way locals do, not the way tourists do. Discover the secrets only those born on the Island know

REGIONAL EXPERIENCES AND REASONS TO BELIEVE

NORTH |LOCAL TASTES	SOUTH | TREASURED PAST TIMES	EAST|UNDERSTATE GEMS	WEST BY NORTH WEST| SERENDIPITY IN EVERY CORNER
By locals, small batch, only in Tasmania • Melita Honey Farm • Truffle farm – interactive hunt with truffle dogs and tasting • Darby-Norris Distillery – started as a hobby, now a passion to share with all • Hazelbrae – age old hazelnut farm and restored homestead	**Learn and take part in local hobbies** • Fly fishing • Nugent – visit and learn about game hunting	**Where Tasmanians take a break** • Small fishing villages • Homely accommodation, nothing fancy • Walnuts • Wineries and restaurants • Twamley Farms homestead	**Fruits of the land at your fingertips** • Street side stumble upons – honesty boxes/fruit stalls, vegie stalls, butcheries • Insta worthy tulip field • Refill water bottles straight from the source – in nature hikes • Topography map guides you towards indigenous trees, herbs etc. • King Island – hear local stories and eat at Wild Harvest


TASMANIA
COME DOWN FOR AIR

Global Experience Inspiration

Napa Valley

- Farm to paddock farms supplying to local restaurants

New Zealand

- Local gems like Matakana village farmer’s market and Bracu olive grove restaurant benefit from the halo NZ image

Rancho Chayote, Costa Rica

- Everything in the accommodation brings to life the coffee culture from the furniture made with local wood and craftsmanship to the art work on the lamps and the shape of the rooms

The Sundowner, Singapore

- Rooftop urban farming and beekeeping courses, only known by locals, delivers to renowned restaurants and bakeries

BRAND PROPOSITION **Come Down for Air**

AGRITOURISM PROPOSITION **Cherish the Simple Life**

TASMANIA BRAND PROPOSITION | COME DOWN FOR AIR

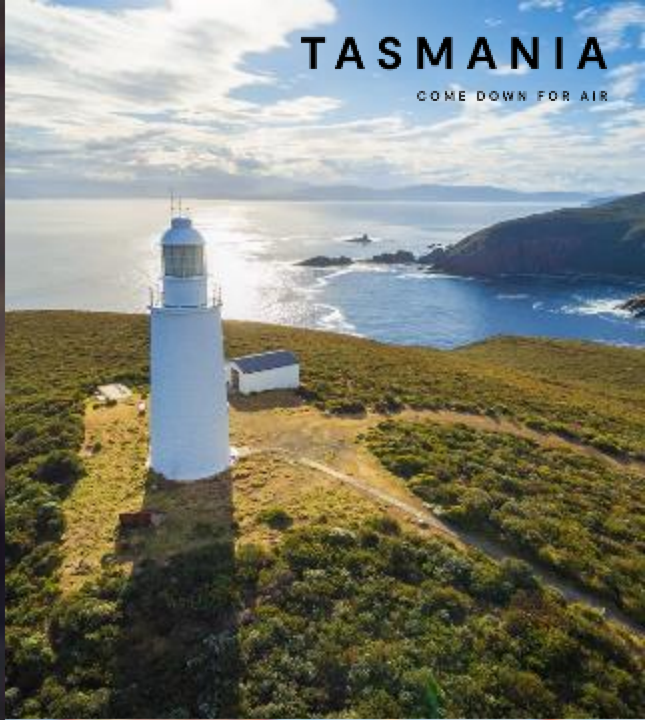
GOAL | Broaden Tasmania's appeal by playing like a culture brand, not just another tourist destination	**INSIGHT** | Modern city life strips the humanity out of people and makes them feel repressed and stressed	**IDEA** | Tasmania is the antidote to modern city life (a place where bohemian-at-the-heart can experience a more creative, vital existence… even if just for a moment)

AGRITOURISM PROPOSITION | CHERISH THE SIMPLE LIFE

GOAL | Make Tasmania the heart of sustainable living and hyperlocal products in Australia.	**INSIGHT** | As urban lives remove people from nature, sustainability is starting to become much needed luxuries	**IDEA** | Everything in Tasmania is small batch, hyperlocal, niche and things you can't get anywhere else. We live off the land and respect it

REGIONAL EXPERIENCES AND REASONS TO BELIEVE

NORTH | SUN KISSED FRUITS OF THE LAND	SOUTH | SOHO OF TASMANIA	EAST | OCEAN'S BOUNTY	WEST BY NORTH WEST|PASTURE GRAZED BEEF
Sustainable vineyards, organic fruits and sustainable living • World class wine, sustainable vineyards – Holm Oak • Cherry Top Cottages	**Nature's inspirations from South of Hobart** • Bruny Island • Glen Huon Dairy • Hobart – restaurants partnering with surrounding sustainable farms	**Sustainable fisheries** • Sustainable salmon farms • Going out with a boat, catching your own and cooking while learning about preservation	**Nature at its finest** • Robbins Island Wagyu – learn about natural beef farming process and quality through culinary experiences • Organic wild forage farms e.g. Kindred Organics • King Island - Kittawa luxury sustainable lodge


TASMANIA
COME DOWN FOR AIR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BRUNY
ISLAND
MAVISTA
PICNIC
AREA
CLOUDY
BAY
West
Cloudy
Hd
East
Cloudy
Hd
Mt Bruny
Mangana Bluff
Bay
of
Islands
Tasman Hd

Global Experience Inspiration

Outstanding in the field, Mt Fuji

- Sustainable vineyard, world class technology in growing grapes and making environmentally friendly wine enjoyed against the backdrop of Mt. Fuji

Rancho Margot, Costa Rica

- Elevated sustainability with upcycling, recycling and supplies from surrounding farms only

ANZ region

- Farm tours dialling up how a cow is raised e.g. free roaming, stress free, fresh grass graze and how that leads to healthy, natural, high quality produce/beef

Other inspirations

- Sustainable hobby farms and fisheries

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TASMANIA
COME DOWN FOR AIR

BRAND PROPOSITION **Come Down for Air**

AGRITOURISM PROPOSITION **Hidden Treasures of Time**

TASMANIA BRAND PROPOSITION | COME DOWN FOR AIR

GOAL | Broaden Tasmania's appeal by playing like a culture brand, not just another tourist destination	**INSIGHT** | Modern city life strips the humanity out of people and makes them feel repressed and stressed	**IDEA** | Tasmania is the antidote to modern city life (a place where bohemian-at-the-heart can experience a more creative, vital existence… even if just for a moment)

AGRITOURISM PROPOSITION | HIDDEN TREASURES OF TIME

GOAL | Build Tasmania's image as the ultimate place for slow living – slow food, slow drinks as a luxury getaway	**INSIGHT** | There is never enough time to slow down, breathe, really taste the coffee, and the food	**IDEA** | Tasmania is a place where everything is made with time and enjoyed with plenty of time. From wine to cheese to crafts like distilleries and age old wisdom of indigenous culinary and craft techniques

REGIONAL EXPERIENCES AND REASONS TO BELIEVE

NORTH | VINES RIPE WITH TIME

Cold climate, slow ripe grapes

- Wine tours
- Holm Oak – Fermented wine process
- Launceston farmer's markets – collection of curated food and wine experiences
- Pair wine with Ashgrove Farm's cheese

SOUTH | CULTURES OF TIME

Fermenting processes unique to Tasmania

- Southern wild fermented food and workshops
- The old meets new – indigenous process fused with modern e.g. Try indigenous ferments like Wayalinha
- Grab a drink at some of the oldest pubs in Australia

EAST | THE GOLDEN AGE

Experience a slower life in the fresh air

- Small communities
- Seafood and seafood markets
- Wukalina walk and indigenous wine and culinary trail includes indigenous craft making experiences

WEST BY NORTH WEST| THE BEST OF TIMES

Good things take time

- Australian Wild Harvest tours
- Hellyears Road Distillery – Australia's largest whisky distillery
- Take a breath with a cup of tea at our wild rhododendron garden
- Stay at Captain's Rest – heritage building, curated collection of antiques


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COME DOWN FOR AIR
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Global Experience Inspiration

Oregon cheese trail

- Partnering with food, wine and distilleries

Californian cheese trail

- Dialling up age old tradition and dairy wisdom only unique to CA region

Hawaii tourism

- Incorporating age old traditions and techniques of indigenous culture in food tourism

Other inspirations

- Globally there is a rising trend in understanding indigenous cultures, craft and culinary from different markets to connect with both the present culture as well as past

Appendix A: Agritourism U&A and Tasmania's Brand Positioning

Findings from the Australian traveller survey May-June 2021

Tourism Tasmania

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Overview of the Agritourism Usage and Attitudes survey

Sampling

We contacted n=1,000 respondents from across Australia

Timing

Fieldwork ran from 21/05/2021 to 04/06/2021

Locations

A nationally representative split of states and territories from across Australia was sampled, excluding those from Tasmania

Target Audience

Respondents were nationally representative across age, gender and location

Respondent criteria: those that have travelled domestically within the past 12 months or are planning to travel within the next 12months + non rejectors of Agritourism experiences

Methodology

Respondents were contacted via an online panel, and completed the survey in 20 minutes online

Objectives

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

1

Summary of the U&A Findings

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Summary of Key Findings | Agritourism U&A survey

The Australian agritourism market landscape

- Consumers typically associate the term ‘Agritourism’ with farms and agriculture (a narrow definition) though it is an unknown term for many
- Wineries/ farm stays & fruit picking are the top associated activities by consumers
- There is a very low level of rejection for agritourism activities (and Tasmania) among Australian travellers with 7 in 10 ‘in market’ for our offer
- Agritourism is a growing space with spend among domestic visitors continuing to increase
- We have identified three types of consumer segments in Agritourism, based on their reason 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

Usage | Past behaviour & future intent

- 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
- In terms of spend, our higher ticket agritourism experiences are ‘make your own’ experiences, farm stays, and indigenous heritage tours.
- Experiences like visiting a café/restaurant or alcoholic tours/tasting have broader appeal despite lower average spend per person
- 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

Attitudes | Motivation & activation

- There are a range of motivations and needs across the different activities – but achieving a sense of fun/ enjoyment is most common
- 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 or the experience they are having.
- Patriotism or ‘supporting local’ also plays a key role in agritourism. Agritourists have a strong desire to support local businesses and seek out local food/produce during their holidays.
- 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.

Tasmania’s brand positioning

- It is crucial to be a meaningfully different destination brand in the context of agritourism
- Activating against Tasmania’s strengths through engaging experiences is key to repeat travel, increased spend and recommendations to drive further growth
- Tasmania’s strength in meaning and difference has put us in an unique position in the category. We are seen as the most different destination brand within the context of agritourism
- Our key strength lay in being a destination that offers travellers with the ability to “slow down and enjoy” through the agritourism offering. Tasmania also stands out for its connection with nature, and produce that is of superior quality.

2

Consumer Understanding of the term ‘Agritourism’

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The term ‘Agritourism’ is most commonly associated with farms and agriculture, though many do not know what is meant by this term. A small portion mentioned wine and / or food

WHAT DOES ‘AGRITOURISM’ MEAN TO YOU?

FARMS (23%)

> *It means spending time at **farms** and rural areas where you can participate in various agricultural activities*

> ***Farm** stays and visits to farms and other locations like wineries, farm gate, farmers markets*

FOOD (3%) AND WINE (1%)

> *Would be agricultural tourism, touring country **farm** areas to see where all our **food** and **wine** is grown*

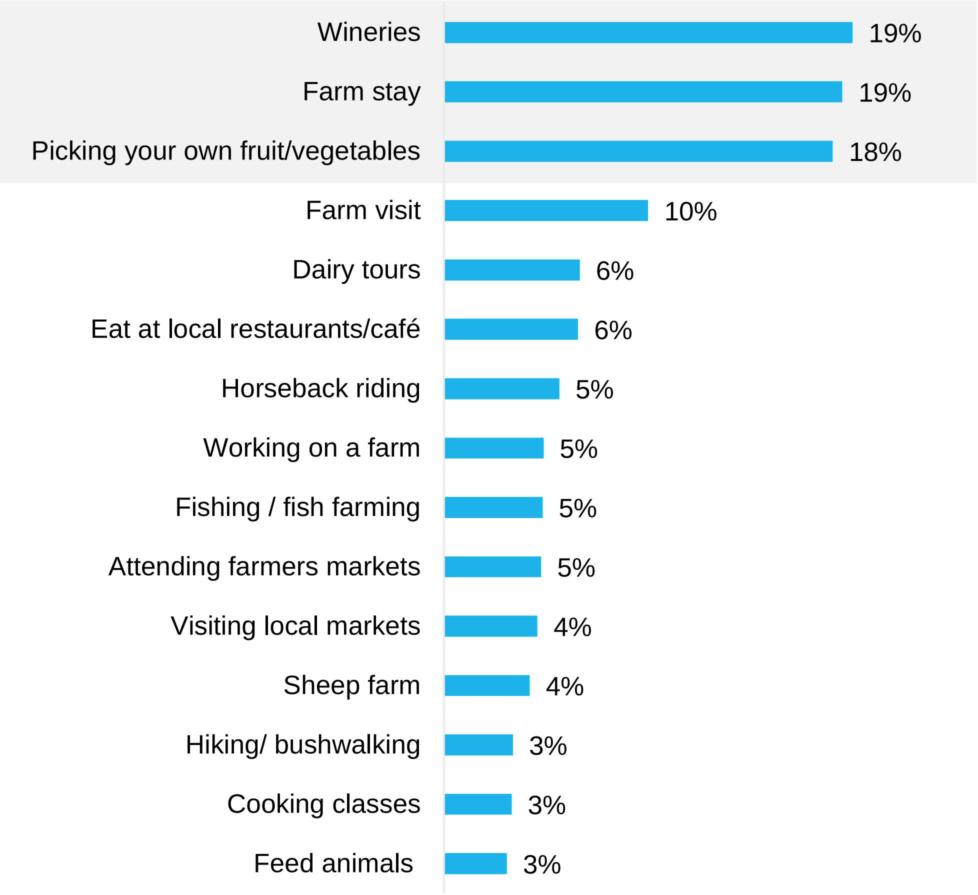
> *Tourism based on the agriculture - like **wineries** and **food***

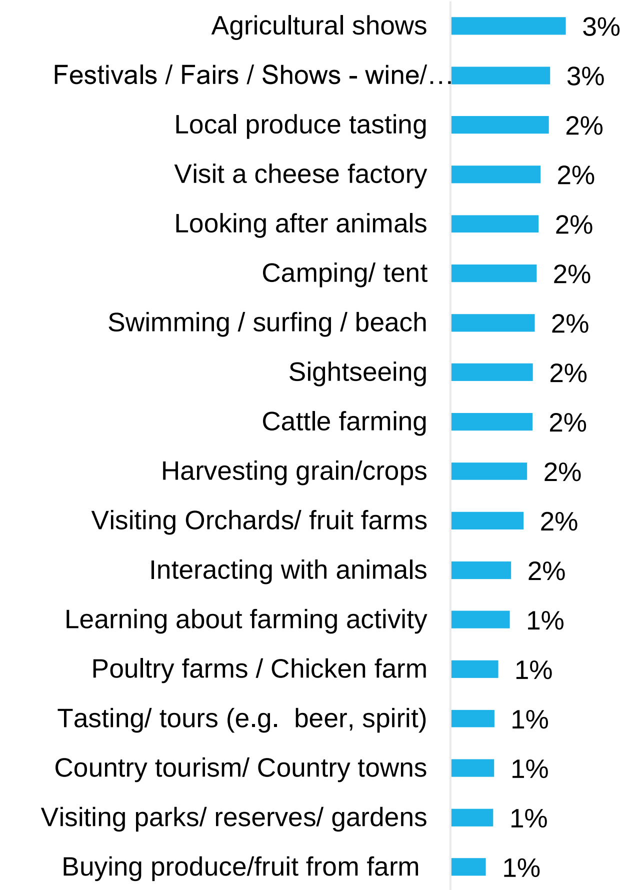
NO IDEA / DON’T KNOW (16%)

DEFINE_AGRITOURISM_TERMINOLOGY : What does “Agritourism” mean to you?
Base: total n=1000

When prompted with a broad description, activities that come top of mind are predominantly wineries, farm stay/visits and fruit / vegetable picking

TOP OF MIND ASSOCIATIONS





Thinking now about the different things that you can do in a holiday, what activities can you think of that allow you to experience local produce/agriculture to learn more about a property, farming activity or produce (or engage with local agriculture or farming in any way)?

Base: n=1000

3

Market landscape

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There is a very low rejection rate of Tasmania or agritourism activities amongst Australian travellers – almost 7 in 10 domestic travellers are potentially 'in market' for our offer

HOW MANY AUSTRALIANS **WOULD CONSIDER AGRITOURISM ACTIVITIES?**

Total Australian market (exc. Tasmanians)

75%

of Australians would go on a **leisure holiday** within Australia for at least **one or more nights every 2 years**

71%

of Australians would **not reject Tasmania**

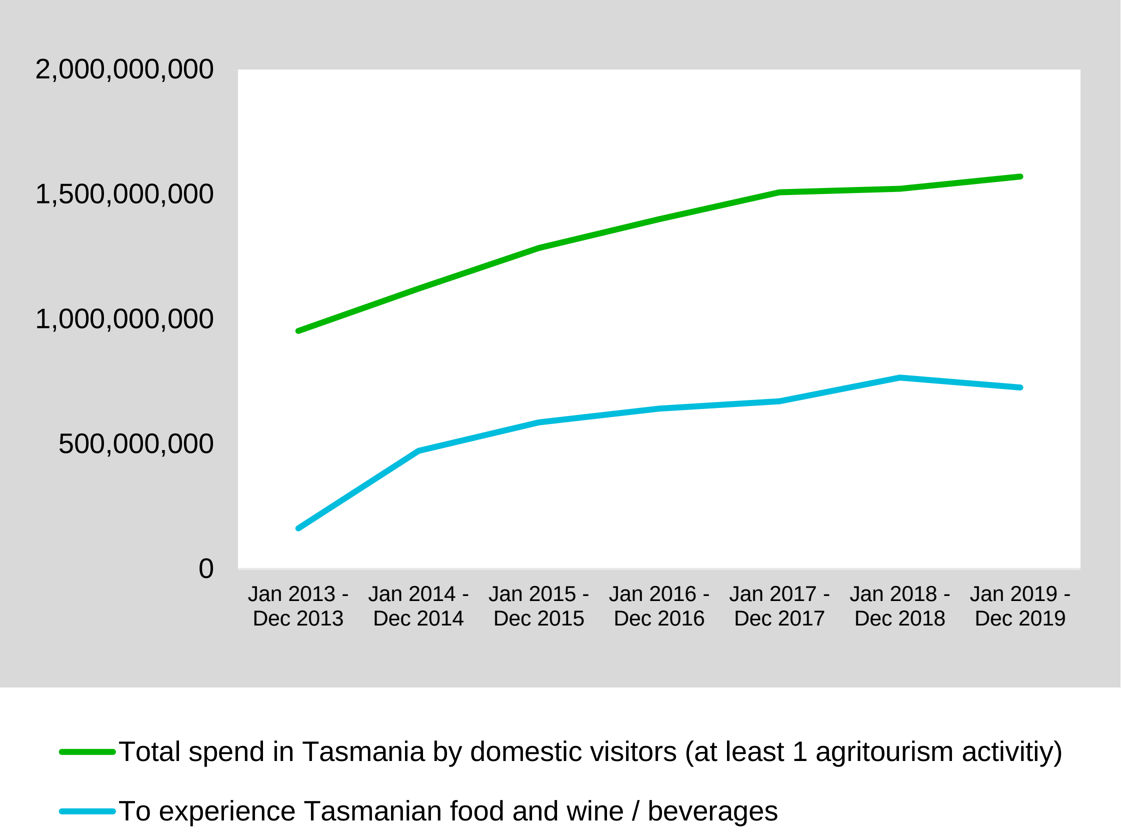
68%

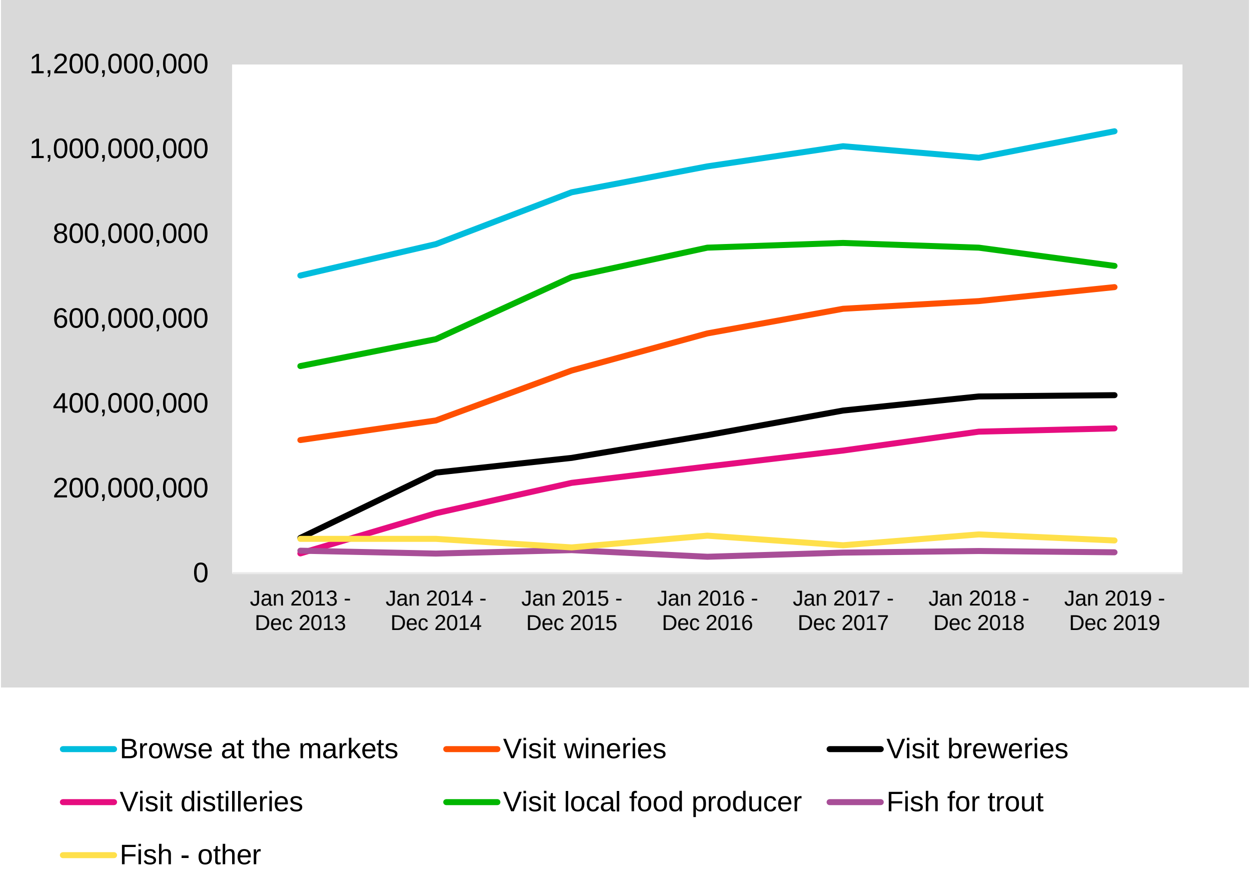
of Australians would **consider at least one agritourism activities**

Base: Unweighted screener data; n= 2243
CAT_USAGE: How often do you go on a leisure holiday within Australia for at least one or more nights? NON_REJ_TAS: Which destinations would you never consider taking a trip of one night or more for leisure holidays? NON_REJ_AGRI: Below is a list of activities you could do on a holiday. Which of these would you consider doing as part of a leisure holiday?

Spend amongst domestic visitors who have participated in at least 1 agritourism activity has continued to increase since 2013

DOMESTIC TOURISM REVENUE (TVS)



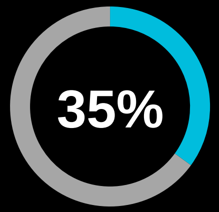


Source: TVS Data - Total spend in Tasmania by domestic visitors who participated in at least one agritourism activity/influence, Jan 2013 onwards.
Note: Jan-Dec 2020 not reported

Introducing our Agritourist segments

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

REASON TO TRAVEL



Of
Agritourists

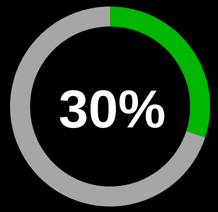
Agritourism-first traveller

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?



Of
Agritourists

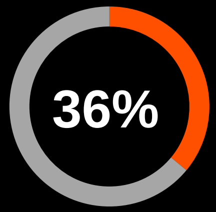
Destination-first traveller

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.



Of
Agritourists

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.

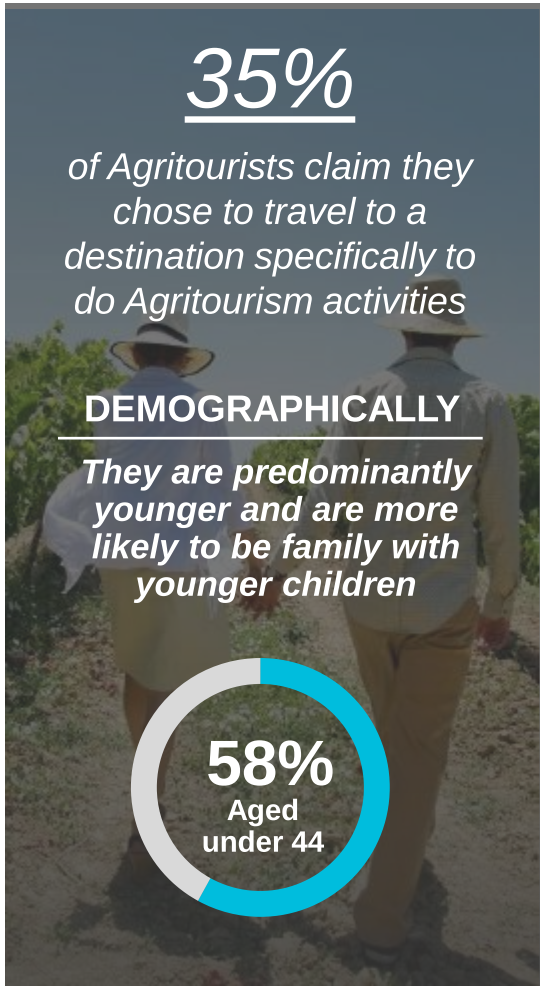
They are not only fond of weekend trips but also willing to take trips that are longer than a week.

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.

Agritourism-first travellers participate in a wide range of agritourism activities and are willing to experience more. Trips tend to be much shorter among this group

Who is an Agritourism-first traveller? What does their typical Agritourism trip look like?



PAST EXPERIENCE

Overall, they participated in different activities, including the less popular ones

9.4/15
Avg No. activities

NEXT ACTIVITY

Interested in all activities, even the less popular ones, such as "Heritage farming" and "DIY experiences"

Top 5 activities	
Local farmers'/ produce market	74%
Visiting a café or restaurant	74%
Tasting/ tours	72%
Food/ Beverage Festival	71%
'Pick your own' fruit/ vegetable	67% ↑

TRIP LENGTH

They prefer to take a shorter trip for their desired agritourism activities. Potential to extend to a weekend trips

Day trip	25% ↑
One night	16%
2-3 nights	39%
4-6 nights	11% ↓
One week or more	9% ↓

LAST VISIT TAS

Within a year	17% ↑
About 1-2 years ago	13% ↑
About 3-4 years ago	15%
More than 5 years ago	24% ↓
Never visited	30%

TRAVEL FREQUENCY

Heavy Agritourist	26%
Medium Agritourist	32%
Light - Very Light Agritourist	42%

KANTAR | TASMANIA COME DOWN FOR AIR

↑↓ Significantly lower/higher than total

LAST_REA: Thinking about the holiday in [LOCATION] where you took part in [ACTIVITIES], which of these best describes your decision at that time? NEXT_ACT: Imagine you're dreaming up your ideal holiday involving Agritourism. How likely are you to do each of these activities? LAST_LENGTH: How long were you away on your last holiday? AGE: Which age group do you fit into? Last visit TAS:
Base: n=323

Destination-first travellers also participate in different agritourism activities but at a lower frequency. They are more likely to take weekend (2-3 night) trips

Who is a Destination-first traveller? What does their typical Agritourism trip look like?

30%

of Agritourists claim they chose to travel to a destination first and then chose the activities before they arrived

DEMOGRAPHICALLY

They are similar age as Agritourism-first travellers but with higher income and no kids

57% Aged under 44

PAST EXPERIENCE

Overall, they participated in different activities, but mostly the popular ones

8.8/15 Avg No. activities

NEXT ACTIVITY

Interested in popular activities from visiting café to local farmers market

Top 5 activities

Visiting a café or restaurant	77%
Food/ Beverage Festival	73%
Local farmers'/ produce market	73%
Tasting/ tours	72%
Curated meals using local produce	58%

TRIP LENGTH

Trips tend to be short-break or over the weekend

Day trip	12% ↑
One night	13%
2-3 nights	41%
4-6 nights	19%
One week or more	15%

LAST VISIT TAS

Within a year	11%
About 1-2 years ago	10%
About 3-4 years ago	21%
More than 5 years ago	24% ↓
Never visited	34%

TRAVEL FREQUENCY

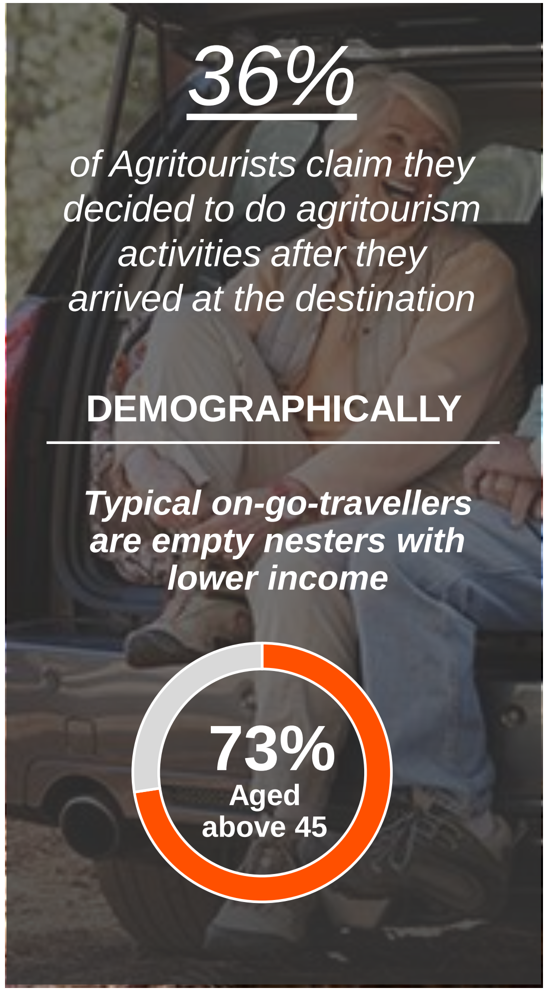
Heavy Agritourist	23%
Medium Agritourist	35% ↑
Light - Very Light Agritourist	42%

↑↓ Significantly lower/higher than total

LAST_REA: Thinking about the holiday in [LOCATION] where you took part in [ACTIVITIES], which of these best describes your decision at that time? LAST_ACT: Which activities did you do on this trip? AUTHENTICITY: How important are the following things in enriching your experience when you chose to engage with agritourism? NEXT_ACT: Imagine you're dreaming up your ideal holiday involving Agritourism. How likely are you to do each of these activities? LAST_LENGTH: How long were you away on your last holiday? AGE: Which age group do you fit into?
Base: n=278

On-the-go travellers are not engaged with a variety of agritourism activities. They are often taking trips that are longer than a week

Who is an On-the-go traveller? What does their typical Agritourism trip look like?



36%

of Agritourists claim they decided to do agritourism activities after they arrived at the destination

DEMOGRAPHICALLY

Typical on-go-travellers are empty nesters with lower income

73% Aged above 45

PAST EXPERIENCE

Overall, they are the least likely to participate in different activities

6.6/15 Avg No. activities

NEXT ACTIVITY

Typically interested in popular activities

Top 5 activities	
Visiting a café or restaurant	80%
Local farmers'/ produce market	76%
Food/ Beverage Festival	67%
Tasting/ tours	64% ↓
'Pick your own' fruit/ vegetable	50% ↓

TRIP LENGTH

Trips are typically 2-3 nights over the weekend with potential to extend to one week or more

Day trip	8%
One night	8%
2-3 nights	34%
4-6 nights	19%
One week or more	31% ↑

LAST VISIT TAS

Within a year	6% ↓
About 1-2 years ago	6% ↓
About 3-4 years ago	18%
More than 5 years ago	40% ↑
Never visited	30%

TRAVEL FREQUENCY

Heavy Agritourist	22%
Medium Agritourist	26%
Light - Very Light Agritourist	52% ↑

KANTAR | TASMANIA COME DOWN FOR AIR

↑↓ Significantly lower/higher than total

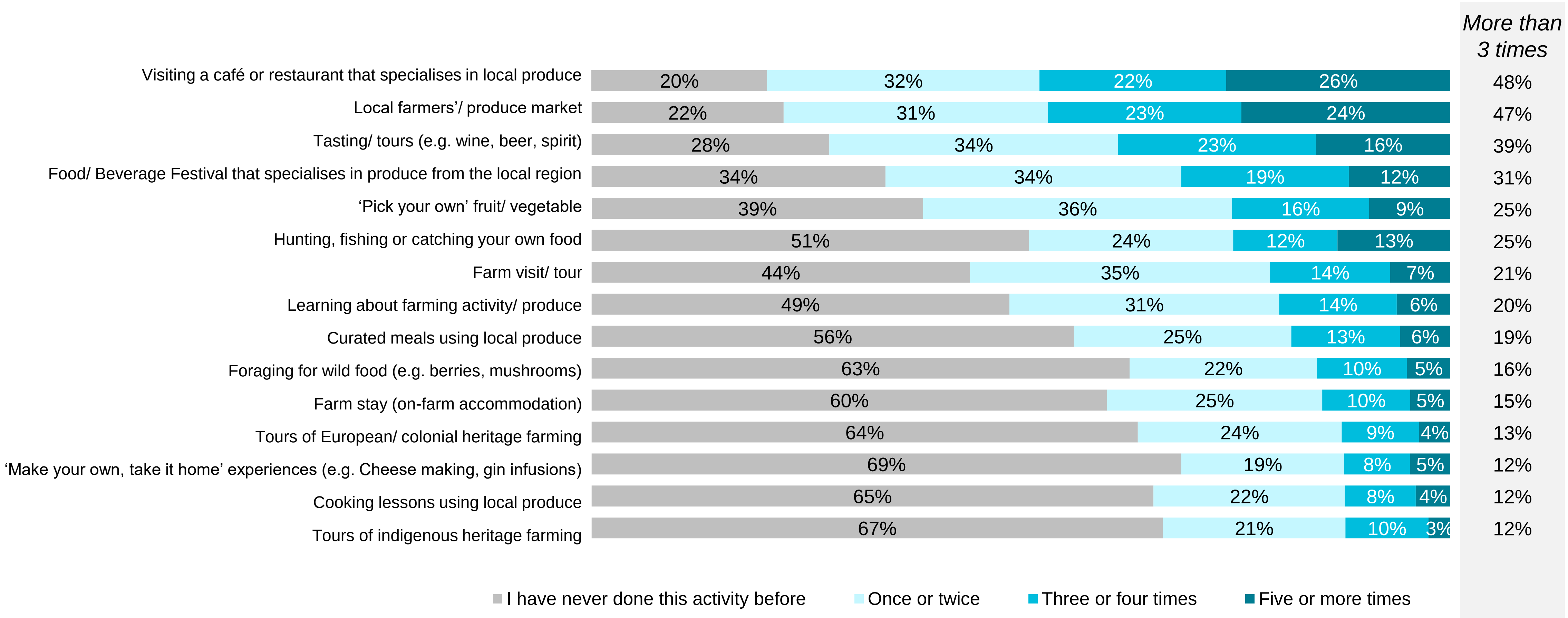
LAST_REA: Thinking about the holiday in [LOCATION] where you took part in [ACTIVITIES], which of these best describes your decision at that time? LAST_ACT: Which activities did you do on this trip? AUTHENTICITY: How important are the following things in enriching your experience when you chose to engage with agritourism? NEXT_ACT: Imagine you're dreaming up your ideal holiday involving Agritourism. How likely are you to do each of these activities? LAST_LENGTH: How long were you away on your last holiday? AGE: Which age group do you fit into?
Base: n=335

4

USAGE
Past Behaviour

Café’s, markets and tasting/tours are the most popular Agritourism activities based on past usage. Despite a lower participation rate overall, hunting/fishing is less appealing yet encourages more frequent visits among those undertaking the activity

PAST ACTIVITIES



KANTAR | TASMANIA COME DOWN FOR AIR

Source: PAST_EXP1 How many times have you done each of these activities?
Base: Total n=1000

NSW & VIC are key destinations where travellers experience agritourism. In Tasmania, experiences are more typically in cafes/restaurants, markets and with tours of colonial farming

PAST ACTIVITIES BY DESTINATIONS

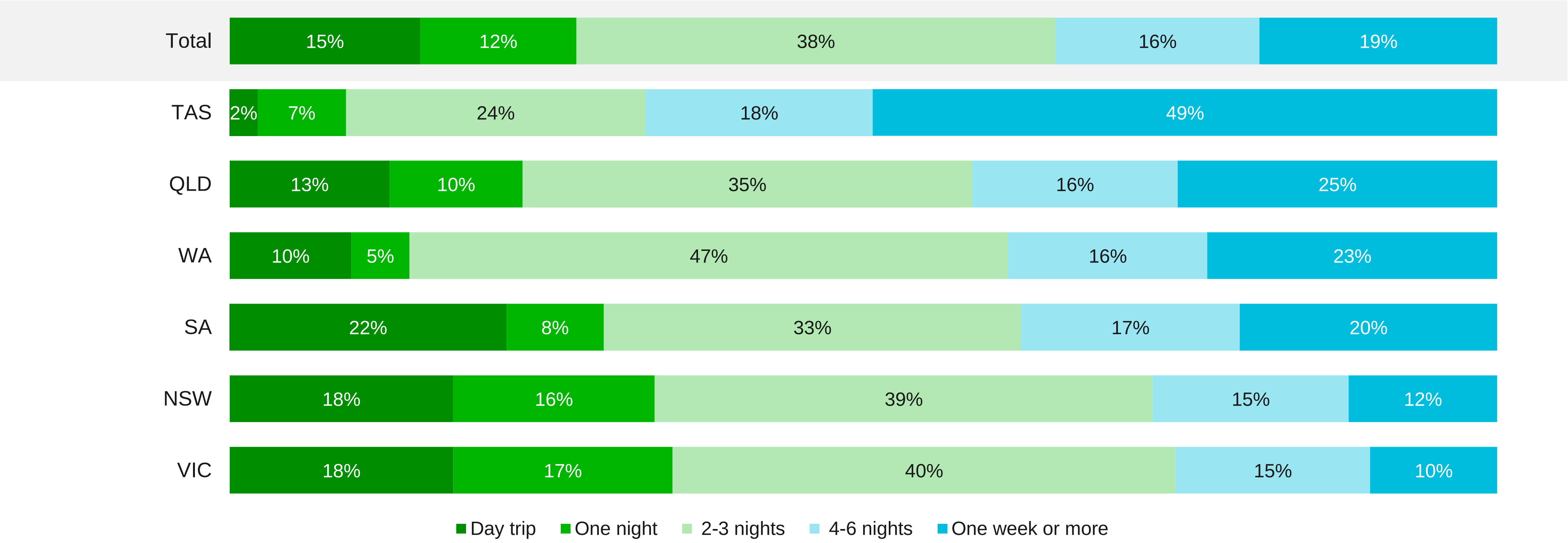
	TAS	QLD	NSW	VIC	SA	WA	NT	ACT
Visiting a café or restaurant that specialises in local produce	25%	39%	41%	43%	27%	22%	12%	8%
Local farmers'/ produce market	22%	34%	36%	40%	24%	18%	10%	9%
Tasting/ tours (e.g. wine, beer, spirit)	17%	23%	37%	36%	37%	20%	6%	8%
Food/ Beverage Festival that specialises in produce from the local region	19%	29%	36%	34%	26%	18%	11%	7%
'Pick your own' fruit/ vegetable	15%	24%	29%	34%	21%	15%	8%	6%
Hunting, fishing or catching your own food	14%	32%	34%	29%	21%	20%	12%	7%
Farm visit/ tour	17%	26%	34%	30%	19%	19%	9%	7%
Learning about farming activity/ produce	16%	26%	34%	31%	20%	18%	9%	7%
Curated meals using local produce	20%	32%	32%	33%	22%	18%	12%	11%
Foraging for wild food (e.g. berries, mushrooms)	19%	25%	28%	32%	19%	16%	12%	10%
Farm stay (on-farm accommodation)	13%	27%	33%	28%	19%	20%	12%	6%
Tours of European/ colonial heritage farming	22%	21%	28%	27%	20%	17%	10%	13%
'Make your own, take it home' experiences (e.g. Cheese making, gin infusions)	17%	25%	31%	25%	23%	20%	12%	11%
Cooking lessons using local produce	15%	26%	28%	30%	21%	19%	14%	12%
Tours of indigenous heritage farming	14%	26%	24%	23%	19%	18%	29%	12%

Source: PAST_EXP2 You mentioned you have done these activities in the past. Where did you do these?

Base: Participated Agritourism activities in the past: n=936

Agritourism trips to Tasmania tend to be much longer than to other states. This indicates opportunity for larger agritourism itinerary but perhaps also a barrier for shorter get aways.

LENGTH OF AGRITOURISM TRIP (LONGEST TO SHORTEST)



***Note: not enough base sizes**

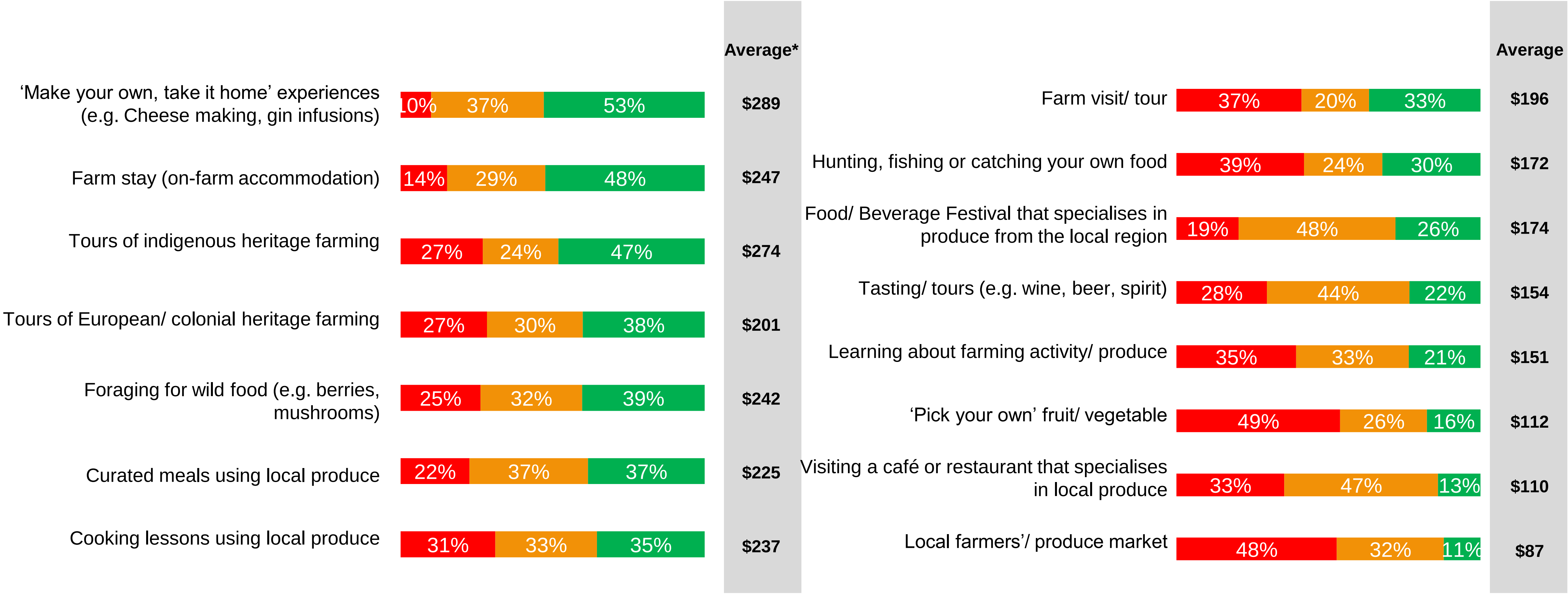
KANTAR | TASMANIA COME DOWN FOR AIR

Source: LAST_LENGTH How long were you away on your last holiday?

Base: Total n=936; Last visit TAS n=50; QLD n=192, NSW n=267; VIC n=202; SA n=104; WA n=92; NT n=16; ACT n=13

Average spend differs greatly by the type of experience. The highest average spend is associated with ‘make your own’ experiences. Almost half of those that visited a local farmers’ / produce market or participated in fruit / vegetable picking spent under $50 for that activity

SPEND ON LAST ACTIVITY



Note: Average spend is based on estimation

Source: LAST_SPEND Approximately how much did you spend on each of these activities on your last holiday?
*Note: base sizes for activities participated on last trip, min n=42

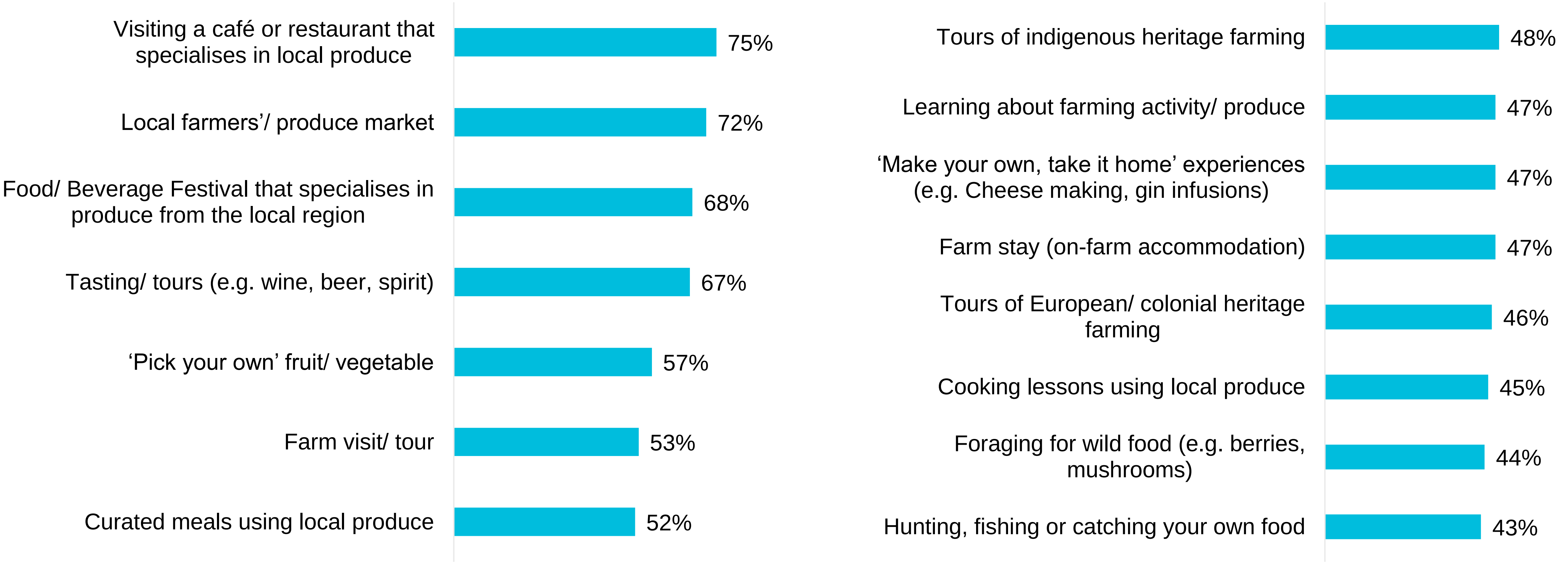
■ Low (Under $50) ■ Medium ($50-$199) ■ High ($200+)

5

USAGE
Future intent

Visiting café, local farmers’ market and food/beverage festival are the most popular activities in consumer’s next trip, aligning with what we see in their past participations

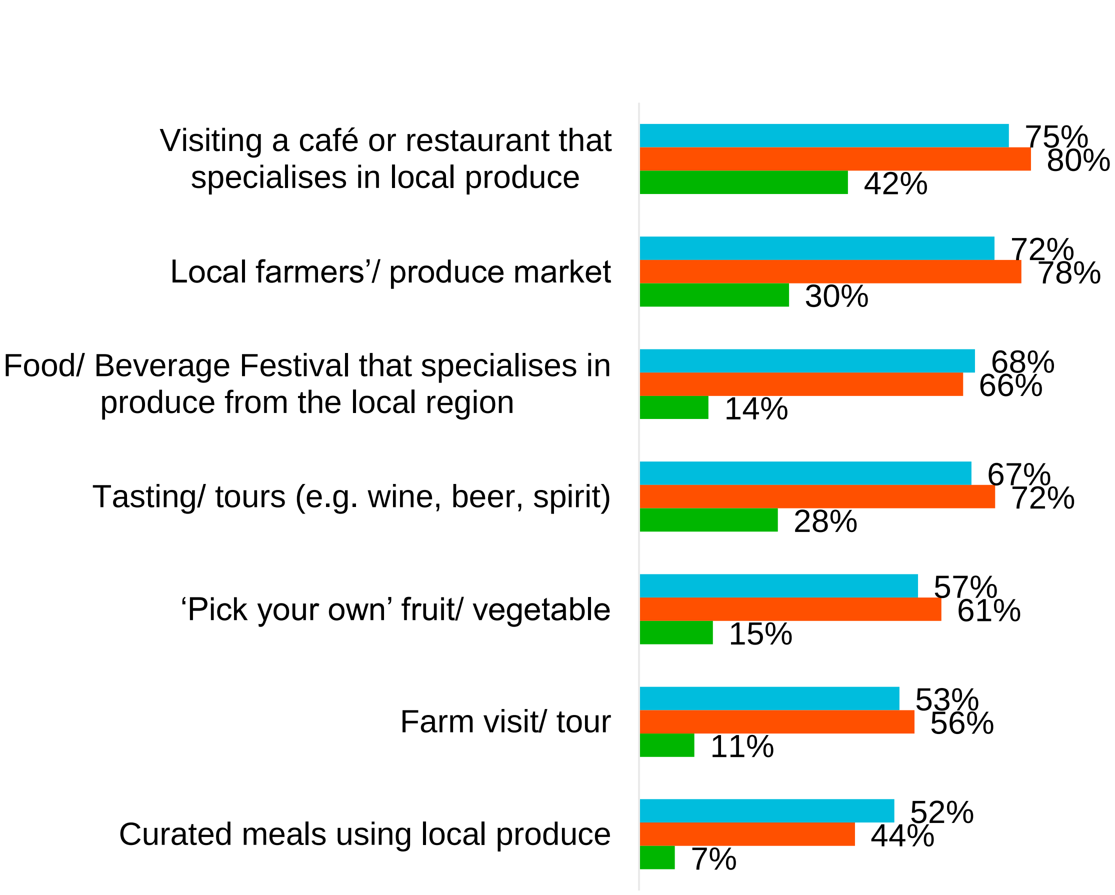
FUTURE INTENTION TO PARTICIPATE ACTIVITIES

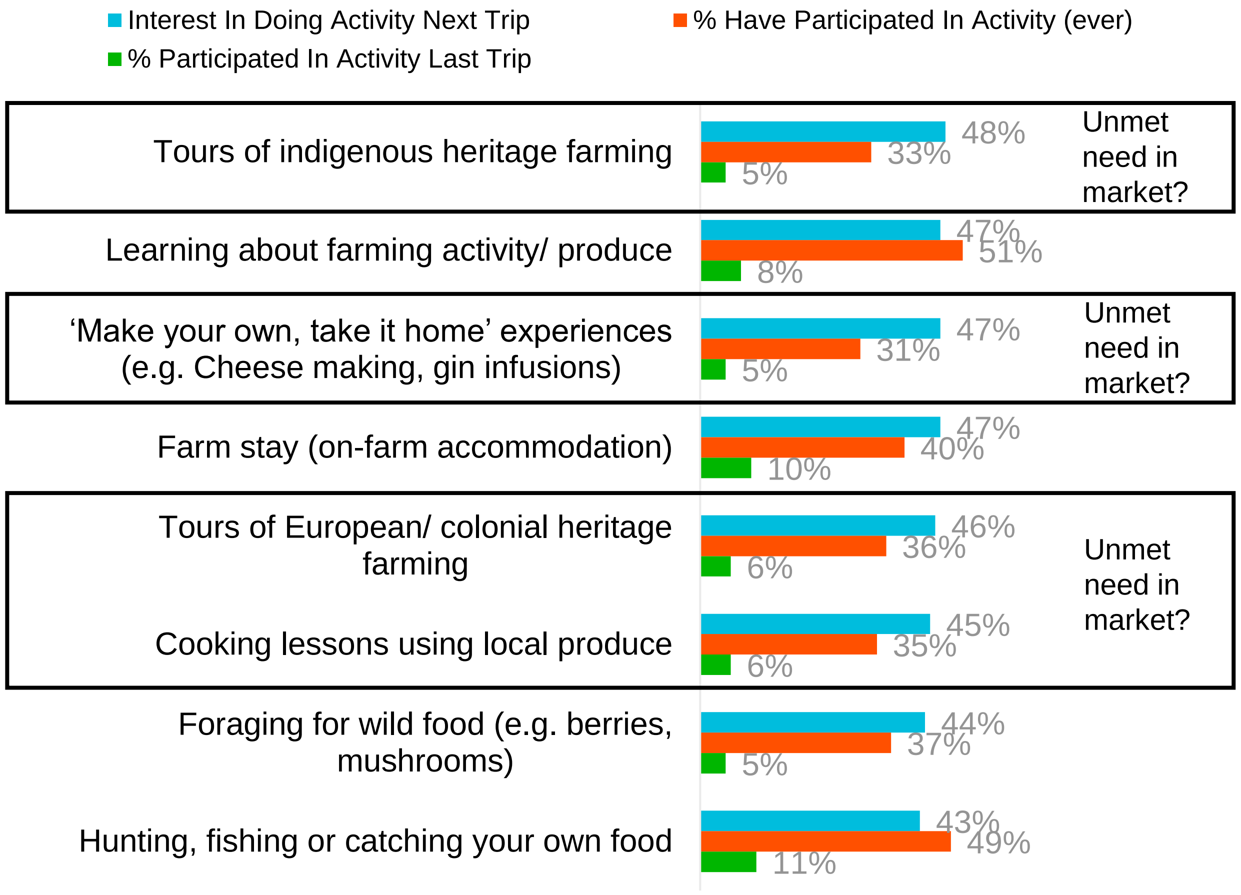


Source: NEXT_ACT Imagine you’re dreaming up your ideal holiday involving Agritourism. How likely are you to do each of these activities? Base: total (n=1000)

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

INTEREST VS PARTICIPATION IN ACTIVITIES

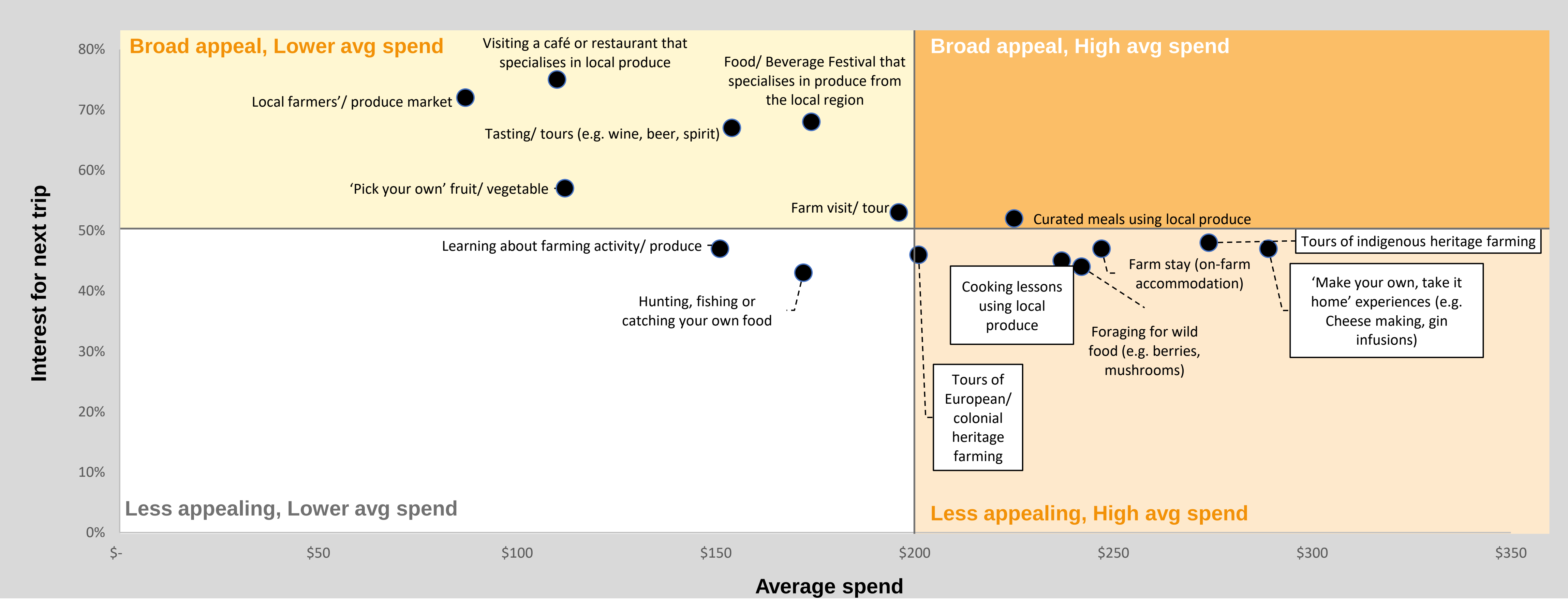




Source: NEXT_ACT Imagine you're dreaming up your ideal holiday involving Agritourism. How likely are you to do each of these activities? PAST_EXP1 How many times have you done each of these activities? LAST_ACT Now we'd like to understand a bit more about your last holiday within Australia that involved one or more of these activities. Which activities did you do on this trip? Base: total (n=1000)

The top three opportunity areas, in terms of addressing the gap between interest and participation, also aligns with higher average spend (though with relatively lower appeal)

INTEREST VS SPEND



Source: NEXT_ACT Imagine you're dreaming up your ideal holiday involving Agritourism. How likely are you to do each of these activities? PAST_EXP1 How many times have you done each of these activities? LAST_ACT Now we'd like to understand a bit more about your last holiday within Australia that involved one or more of these activities. Which activities did you do on this trip? Base: total (n=1000)

SUMMARY

Usage | Past behaviour & future intent

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

6

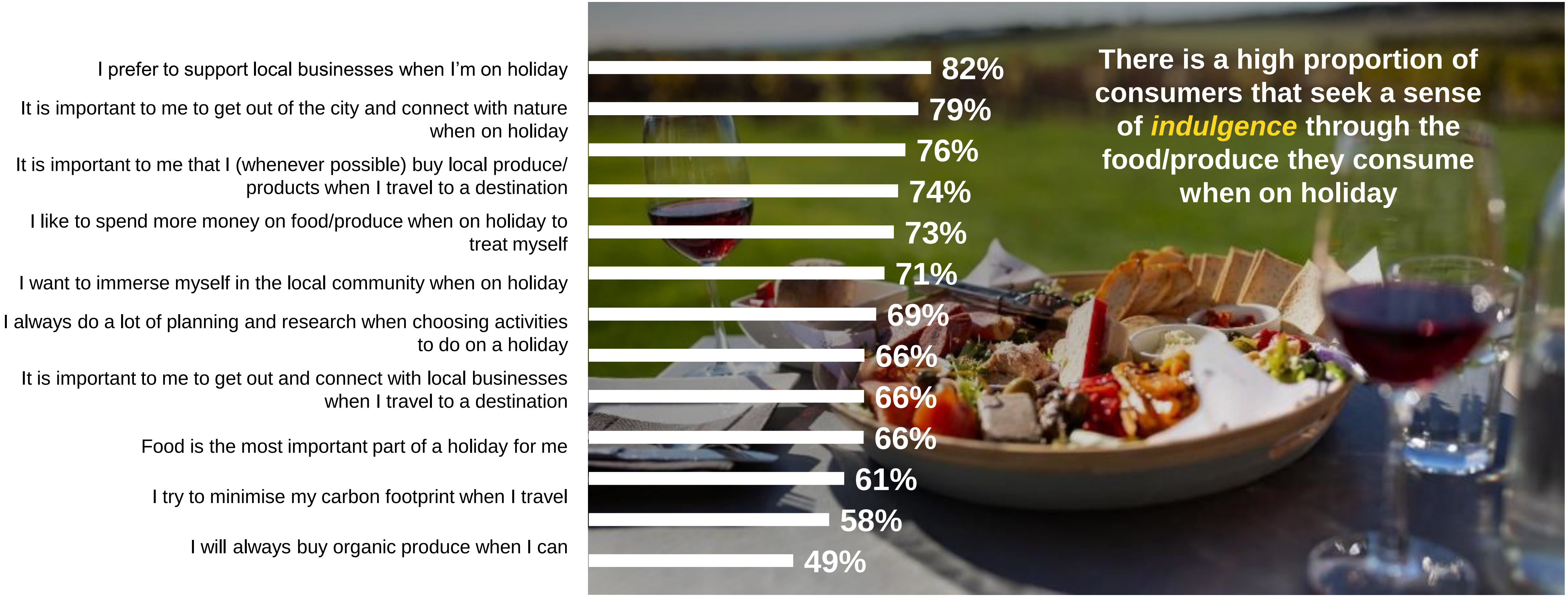
Motivations and Activation

Tourism Tasmania

KANTAR

Supporting local business / local produce and connecting with nature are key elements that consumers seek out when on holiday in general

ATTITUDES (Agree or strongly agree %)



Source: ATTITUDES: How much do you agree or disagree with these statements

Base: total (n=1000)

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

Fun activity to do with others

- **Cooking lessons using local produce**
- 'Pick your own' fruit/ vegetable
- Farm visit/ tour
- **Curated meals using local produce**
- Tasting/ tours (e.g. wine, beer, spirit)

New experience I haven't tried before

- **'Make your own, take it home' experiences (e.g. Cheese making, gin infusions)**
- **Tours of indigenous heritage farming**
- **Foraging for wild food (e.g. berries, mushrooms)**

Relaxing

- **Farm stay (on-farm accommodation)**
- Hunting, fishing or catching your own food

Support local community

- Local farmers'/ produce market
- Food/ Beverage Festival that specialises in produce from the local region
- Visiting a café or restaurant that specialises in local produce

Learn more dest / agriculture

- **Tours of European/ colonial heritage farming**
- Learning about farming activity/ produce

- **XX** = Highest Average Spend Activities

Source: LAST_MOT What would be your motivations behind choosing to do these activities? LAST_SPEND: Approximately how much did you spend on each of these activities on your last holiday?

Base: total (n=1000)

Underpinning their motivations, there are a range of consumer needs to satisfy within agritourism. These mostly centre around a sense of fun and connection with agriculture and local community/culture

UNDERLYING NEEDS FOR ACTIVITIES	Primary Need	Secondary Need	Other Over-indexing Needs
Visiting a café or restaurant that specialises in local produce	Indulge and reward myself	Allows me to unwind	Be sociable and engaged
Local farmers'/ produce market	Connect to local agriculture	Connect with local people	Connect with place visiting
Tasting/ tours (e.g. wine, beer, spirit)	Have fun	Indulge and Reward myself	Allows me to unwind, Be sociable and engaged
Food/ Beverage Festival that specialises in produce from the local region	Have fun	Connect to local agriculture	Indulge and reward myself; be sociable and engaged
'Pick your own' fruit/ vegetable	Have fun	Connect with local Agriculture	Feel Adventurous
Hunting, fishing or catching your own food	Have fun	Allows me to unwind	Feel Adventurous
Farm visit/ tour	Connect to local agriculture	Connect with place visiting	
Learning about farming activity/ produce	Connect to local agriculture	Learn more about local agriculture	
Curated meals using local produce	Connect to local agriculture	Connect with local people	Indulge and reward myself
Foraging for wild food (e.g. berries, mushrooms)	Have fun	Connect to local agriculture	Feel Adventurous, Feel peaceful and calm
Farm stay (on-farm accommodation)	Connect with local people	Connect with place visiting	Allows me to unwind, Feel peaceful and calm
Tours of European/ colonial heritage farming	Learn more abt local culture	Connect with place visiting	
'Make your own, take it home' experiences (e.g. Cheese making, gin infusions)	Have fun	Learn more abt local culture	Feel adventurous; Discover myself
Cooking lessons using local produce	Have fun	Connect with place visiting	Be sociable and engaged; Discover myself
Tours of indigenous heritage farming	Learn more abt local culture	Connect with local people	

KANTAR | TASMANIA COME DOWN FOR AIR

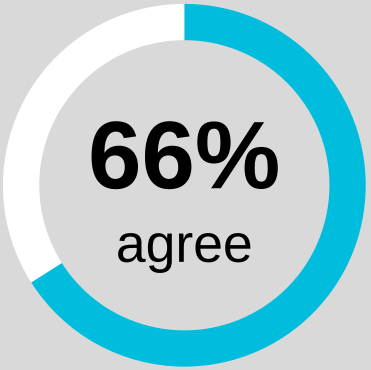
xx = Over-indexing

Source: NEEDS What do you look for when choosing to do these activities?

Base: total (n=1000)

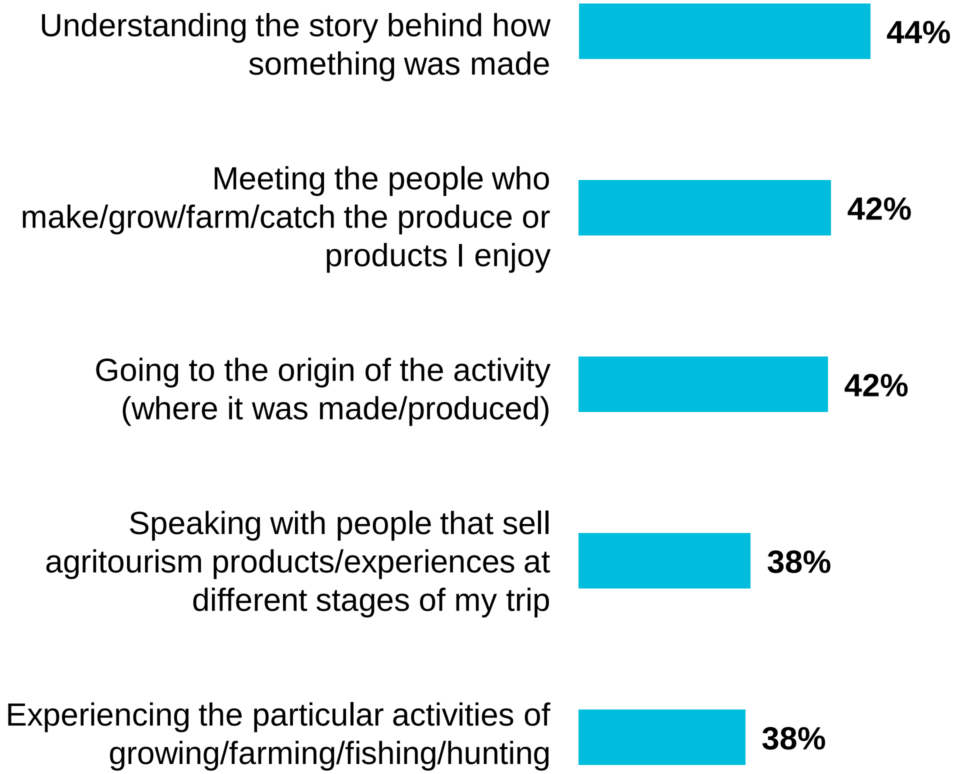
Authenticity is important in any experience - when we drill down into what this means in agritourism we find that effective story telling and connection with people / origin are most important

IMPORTANCE OF EACH ELEMENT OF AUTHENTICITY (very important or extremely important %)



"I always look for an ***authentic*** *experience where I can* ***speak to the person responsible*** *for making the food/ produce"*

"It is important to me to ***learn about how products are made*** *when buying things on holiday"*



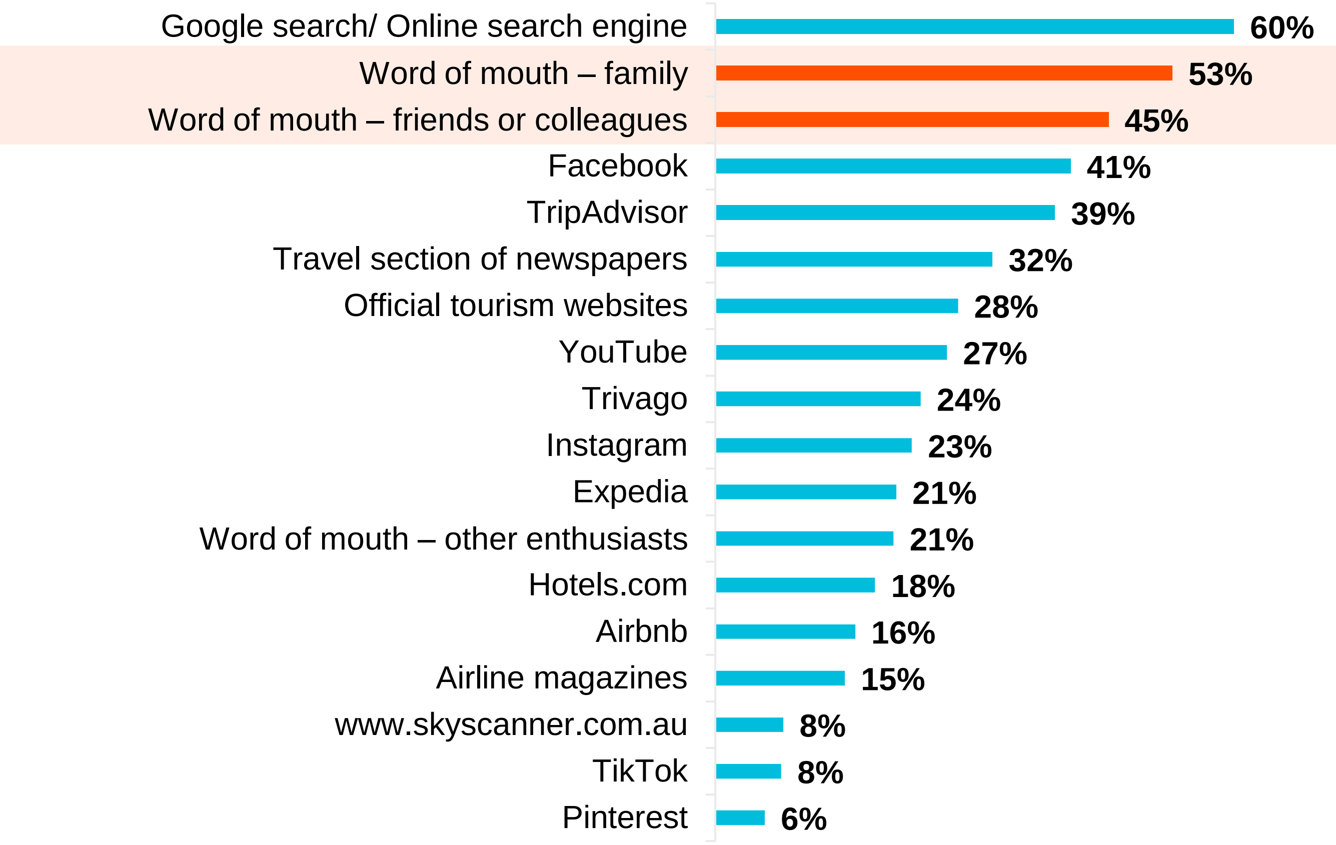
KANTAR | TASMANIA COME DOWN FOR AIR

Source: AUTHENTICITY How important are the following things in enriching your experience when you choose to engage with agritourism?

Base: total (n=1000)

Following online search, WOM from friends and family is a key source of information – highlighting the importance that experiences meet or exceed travellers' expectations

SOURCE OF INFORMATION



Source: ACT_INFL: Where do you get ideas or look for information about agritourism experiences and/or destinations?

Base: total (n=1000)

There are a range of experiences that are more likely to be 'talked about' and shared with others afterwards

Fun activity to do with others

- Cooking lessons using local produce
- 'Pick your own' fruit/ vegetable
- Farm visit/ tour
- **Curated meals using local produce**
- **Tasting/ tours (e.g. wine, beer, spirit)**

New experience I haven't tried before

- 'Make your own, take it home' experiences (e.g. Cheese making, gin infusions)
- Tours of indigenous heritage farming
- Foraging for wild food (e.g. berries, mushrooms)

Relaxing

- Farm stay (on-farm accommodation)
- **Hunting, fishing or catching your own food**

Support local community

- **Local farmers'/ produce market**
- **Food/ Beverage Festival that specialises in produce from the local region**
- Visiting a café or restaurant that specialises in local produce

Learn more dest / agriculture

- Tours of European/ colonial heritage farming
- **Learning about farming activity/ produce**

- **XX** = Above average recommendation / referral of activity

KANTAR | TASMANIA COME DOWN FOR AIR

Source: LAST_MOT What would be your motivations behind choosing to do these activities? ACT_NPS: How likely are you to recommend [PIPE ONE LOCATION SELECTED AT LAST_DES] to friends or family for each of these activities?

Base: total (n=1000)

New experiences and activities that support the local community are more likely to be repeated

Fun activity to do with others

- Cooking lessons using local produce
- **‘Pick your own’ fruit/ vegetable**
- Farm visit/ tour
- Curated meals using local produce
- Tasting/ tours (e.g. wine, beer, spirit)

New experience I haven't tried before

- **‘Make your own, take it home’ experiences (e.g. Cheese making, gin infusions)**
- **Tours of indigenous heritage farming**
- Foraging for wild food (e.g. berries, mushrooms)

Relaxing

- Farm stay (on-farm accommodation)
- Hunting, fishing or catching your own food

Support local community

- Local farmers’/ produce market
- **Food/ Beverage Festival that specialises in produce from the local region**
- **Visiting a café or restaurant that specialises in local produce**

Learn more dest / agriculture

- Tours of European/ colonial heritage farming
- Learning about farming activity/ produce

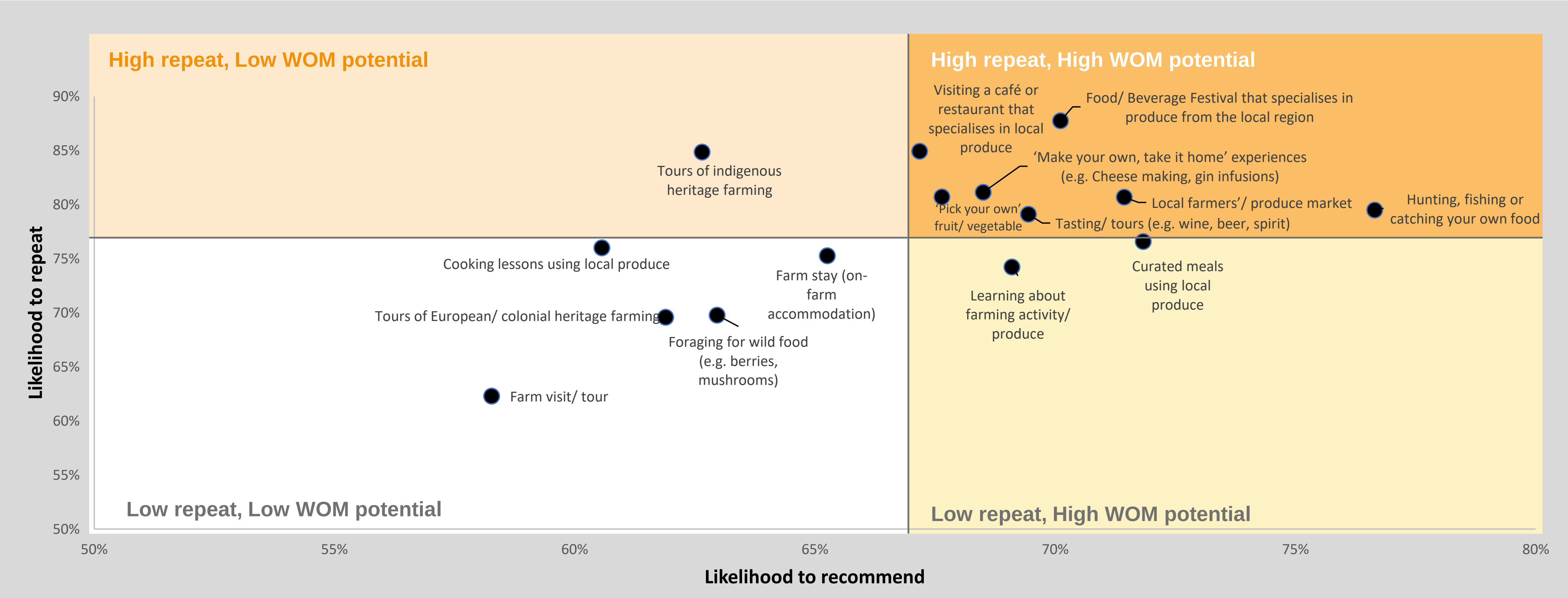
- **XX** = Above average likelihood to repeat activity

Source: LAST_MOT What would be your motivations behind choosing to do these activities? ACT_REPEAT: How likely are you to return to [PIPE ONE LOCATION SELECTED AT LAST_DES] to repeat these activities in the future?

Base: total (n=1000)

Activities with the potential for high impact (through repeat visitation and recommendations) are typically the more popular activities or those with higher spend. Hunting/fishing appears to be the exception – likely drawing travellers passionate about that specific activity

[redacted]



KANTAR | TASMANIA COME DOWN FOR AIR

Source: ACT_NPS How likely are you to recommend [LAST_DES] to friends or family for each of these activities?

SUMMARY

Attitudes | Motivations and Activation

MOTIVATIONS AND NEEDS VARY ACROSS EXPERIENCES

Activating, innovating and creating core tourism partnerships against key needs and motivations to engage with certain activities will be crucial to future growth

AUTHENTICITY IS IMPORTANT IN AGRITOURISM

Authenticity fuels engagement, repeat visitation, spend and underpins needs and motivations for travel.

In Agritourism, the most important factor is understanding the story behind products they are buying and the experience a traveller is having.

Working with our agritourism partners to develop this authentic experience across agritourism activities in Tasmania will be a key challenge in activating and being successful moving forward

PATRIOTISM IS PLAYING A PART IN AGRITOURISM

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 promote tasty local produce from café and restaurant to curated meals

SOME ACTIVITIES INSPIRE REPEAT VISITATION AND RECOMMENDATIONS MORE THAN OTHERS

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.

7

Brand Positioning

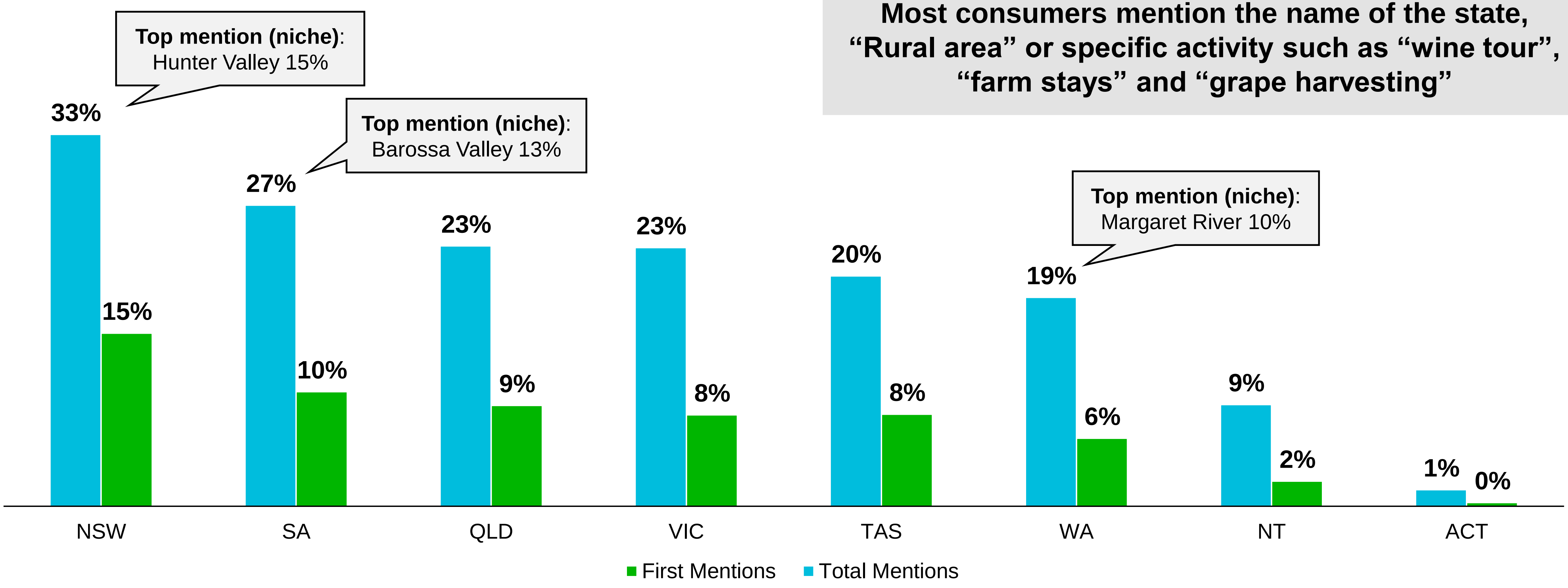
Tourism Tasmania

KANTAR

NSW and SA's top of mind awareness is driven by well-known destinations like Hunter Valley and Barossa Valley. Tasmania is most likely to be mentioned at a state level

TOP OF MIND RECALL OF AGRITOURISM DESTINATIONS

Most consumers mention the name of the state, "Rural area" or specific activity such as "wine tour", "farm stays" and "grape harvesting"



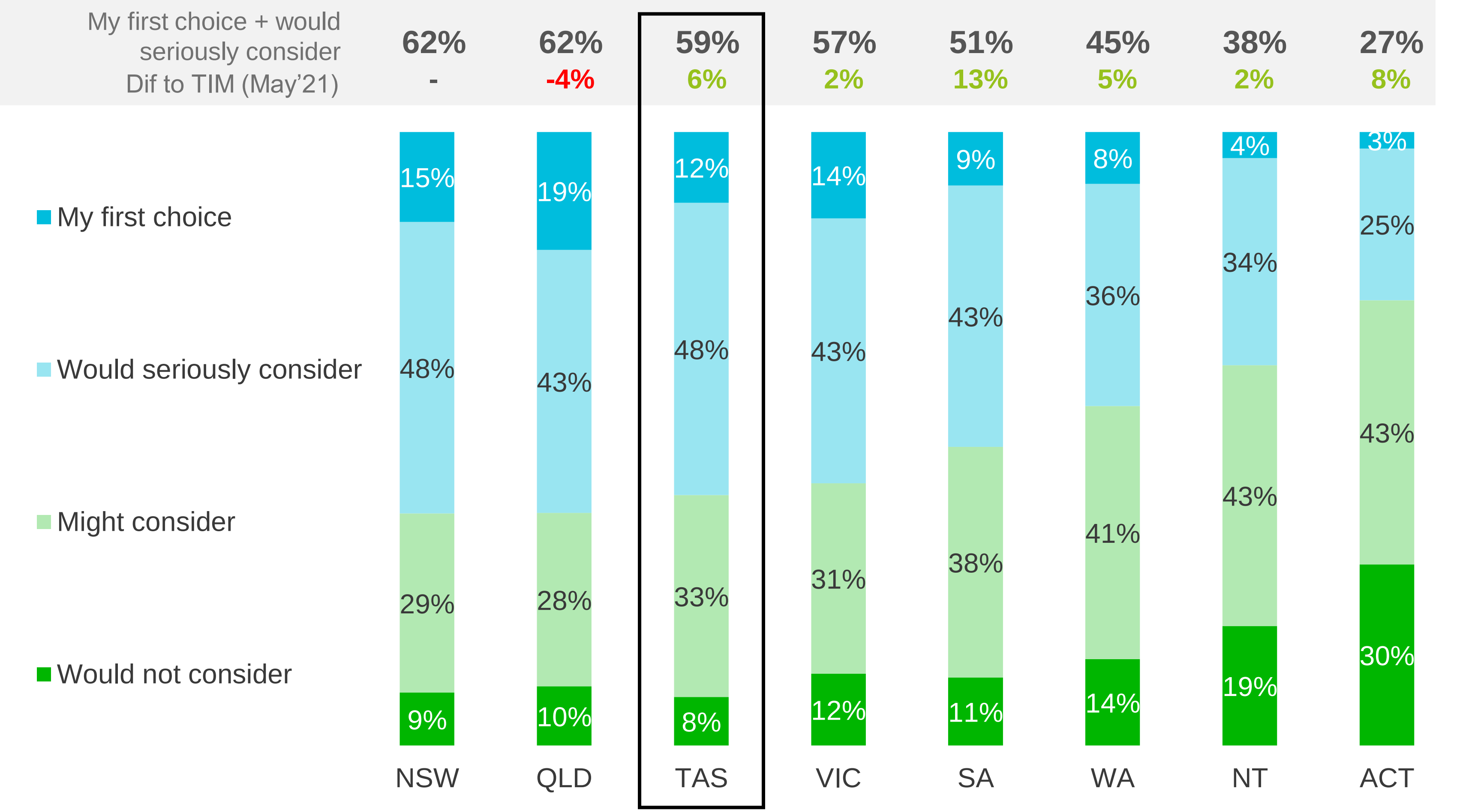
KANTAR | TASMANIA COME DOWN FOR AIR

First Dest: What's the first holiday destination in Australia that comes to mind when thinking of Agritourism? Other Dest: What other destinations in Australia also come to mind when thinking of these types of activities?

Base: n=1000

Comparing to wider domestic travel market, consideration in the agritourism context is similar among major destinations such as NSW, QLD and VIC. Meanwhile, minor destinations like SA and TAS have higher consideration

CONSIDERATION – AGRITOURISM CONTEXT VS. TIM



KANTAR | TASMANIA COME DOWN FOR AIR

Source: CONS_DEST: And how likely are you to consider choosing each of these destinations for your next holiday involving agritourism activities? Base: n= 1000

Overall, NSW and VIC are associated with majority of the activities given their popularity. Tasmania is highly associated with unique offering such as curated meals, foraging and hunting

ASSOCIATION WITH DESTINATIONS

In order of future intention	TAS	QLD	NSW	VIC	SA	WA	NT	ACT
Visiting a café or restaurant that specialises in local produce	46%	41%	50%	51%	44%	35%	25%	22%
Local farmers'/ produce market	47%	44%	49%	51%	46%	33%	23%	20%
Food/ Beverage Festival that specialises in produce from the local region	42%	35%	44%	44%	46%	31%	18%	14%
Tasting/ tours (e.g. wine, beer, spirit)	35%	28%	50%	48%	56%	35%	12%	14%
'Pick your own' fruit/ vegetable	32%	38%	43%	42%	32%	22%	13%	10%
Farm visit/ tour	36%	36%	48%	43%	37%	29%	20%	13%
Curated meals using local produce	38%	33%	37%	36%	35%	27%	22%	16%
Tours of indigenous heritage farming	14%	25%	19%	14%	16%	29%	54%	10%
Learning about farming activity/ produce	33%	37%	45%	38%	35%	27%	18%	12%
'Make your own, take it home' experiences (e.g. Cheese making, gin infusions)	33%	24%	33%	33%	29%	20%	11%	11%
Farm stay (on-farm accommodation)	35%	36%	47%	40%	34%	29%	19%	12%
Tours of European/ colonial heritage farming	28%	16%	30%	27%	26%	14%	10%	11%
Cooking lessons using local produce	36%	29%	36%	37%	36%	25%	22%	13%
Foraging for wild food (e.g. berries, mushrooms)	30%	21%	28%	26%	23%	19%	25%	10%
Hunting, fishing or catching your own food	40%	38%	33%	28%	25%	29%	39%	11%
Avg. no of activities associated with	5.2	4.8	5.9	5.6	5.2	4.0	3.3	2.0

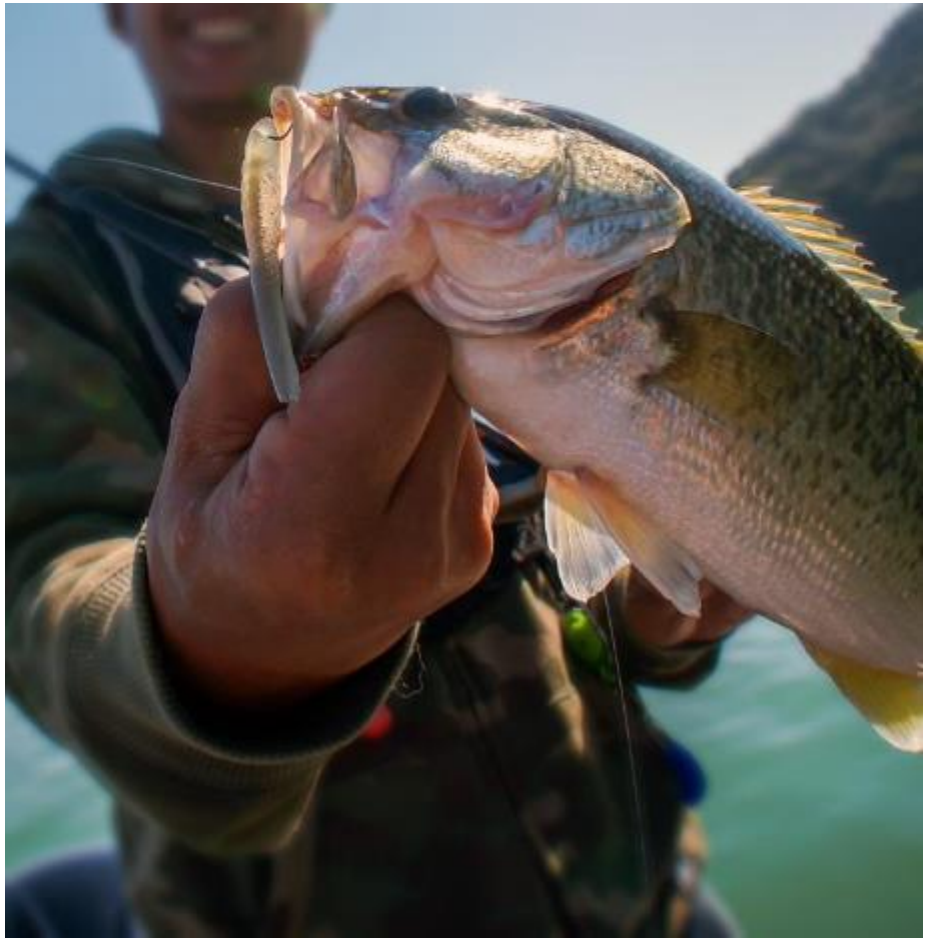
Source: ACT_IMAGE: Which of these destinations do you most associate with...?

Base: n= 1000

Compared to other destinations, TAS has a number of competitive strengths, in areas typically attracting higher than average spend

COMPETITIVE STRENGTHS - ACTIVITIES TAS HAS HIGHEST % ASSOCIATION

Med Avg $	Hunting, fishing or catching your own food	40%
High Avg $	Curated meals using local produce	38%
High Avg $	‘Make your own, take it home’ experiences (e.g. Cheese making, gin infusions)	33%
High Avg $	Foraging for wild food (e.g. berries, mushrooms)	30%



KANTAR | TASMANIA COME DOWN FOR AIR

Source: ACT_IMAGE: Which of these destinations do you most associate with...?

Base: n= 1000

We measure Mental Availability via our unique Meaningfully Different equity framework, which links brand measures to commercial outcomes and will help drive brand value in the Agritourism industry

MEANINGFUL

MEANINGFULNESS

- Consumers affinity for the brand
- How well the brand meets consumer needs

This indicates the extent to which brands build an emotional connection and are seen to deliver against needs

DIFFERENT

DIFFERENCE

- How unique the brand is seen to be
- How dynamic the brand is – does it set category trends

This indicates the extent to which brands set themselves apart from the category, by offering something others don't - intangible or tangible - and by leading the way

SALIENT

SALIENCE

- How top of mind the brand is to consumers

Indicates how quickly and easily the brands come to mind

In the context of agritourism, being meaningfully different is important. Meanwhile, being top of mind is less important compared to the wider domestic tourism context

AGRITOURISM DESTINATIONS - POWER

		TIM Contribution (%)
Meaningful	50%	46%
Different	18%	12%
Salient	32%	42%

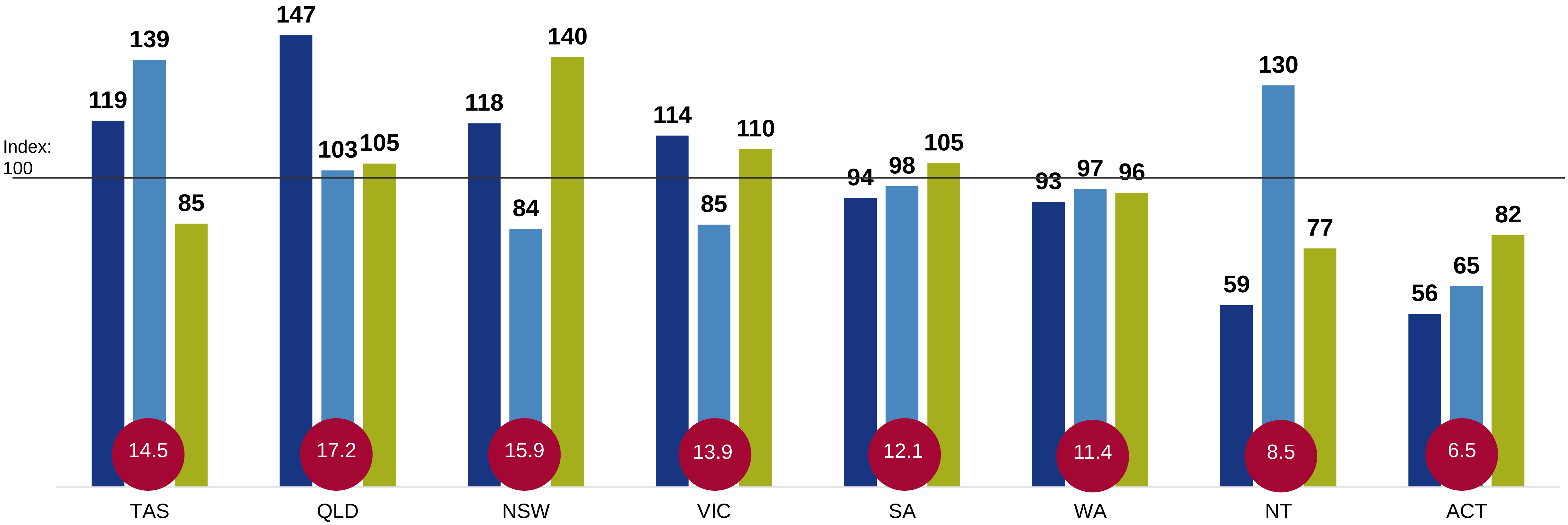
KANTAR | TASMANIA COME DOWN FOR AIR

Base: Aware of destination n=1000

Source: Agritourism MDF analysis
Note: Modelled data

Tasmania has a unique brand profile, being seen as the most different destination in the Agritourism category. NT similarly stands out for being different, but lacks meaning

BRAND POWER - AGRITOURISM



Base: Aware of destinations n=1000
Source: Agritourism MDF analysis
Note: Modelled data

Meaningful | Difference | Salience | Power | Index

Compared to other domestic destinations, we have a strong meaningfully different brand; in prime position to lead growth in the Agritourism space

BRAND POSITION - AGRITOURISM

KANTAR | TASMANIA COME DOWN FOR AIR

Base: Aware of destinations n=1000

Source: Agritourism MDF analysis
Note: Modelled data

Tasmania's relative strength (brand image) lay in the unique attribute of "slow down and enjoy". Tasmania also stands out for its connection with nature, and produce that is of superior quality

COMPETITIVE BRAND IMAGE – EMOTIVE

Ranked order of contribution to Power

		TAS	QLD	NSW	VIC	SA	WA	NT	ACT
Habits and Ritual	Reconnect with friends and family	-10	3	10	7	-1	-3	-8	3
	A place you return to time and again	-5	8	6	5	0	-3	-7	0
Relax and reflect	Relax and destress from everyday life	0	5	-4	-1	0	0	-1	2
	Slow down and enjoy the simpler things in life	6	-1	-3	-3	2	0	2	-1
	Feel reinvigorated	-1	6	0	-1	-2	0	-1	0
	Feel connected with nature	8	0	-4	-2	-4	3	8	-4
	Rediscover what's important to you	-2	-1	-1	1	0	0	-1	2
Food and produce	Enriching experience where you can learn about produce/ food	3	-7	4	5	6	-1	-6	-2
	Produce that is superior in quality than other destinations	5	-1	1	3	5	-1	-7	-1
Unique offerings	Nature and wilderness like nowhere else	9	-1	-8	-9	-7	4	20	-2
Authentic experience	Connect with authentic people	-4	-4	-3	-4	1	1	11	1
	Create lasting memories	-4	-1	-1	-2	-1	1	1	4
	Sense of achievement and satisfaction	-3	-2	3	1	-1	0	-2	3
Agricultural experience	Agricultural activities/ experiences like nowhere else	0	-4	1	-1	4	0	3	-1

Relative strength

Relative weakness

Base: Aware of destinations n=1000

Source: EMOT_IMAGE Which of these destinations do you think…?

Note: variance analysis shown.

In terms of the more functional attributes – good value for money is a key distinguisher for TAS – especially over destinations like NT & WA which also stand out on offering something unique and uncrowded

COMPETITIVE BRAND IMAGE – FUNCTIONAL

Ranked order of contribution to Power		TAS	QLD	NSW	VIC	SA	WA	NT	ACT
Habits and Ritual	Easily accessible by car or vehicle	-12	-1	12	8	2	-6	-7	6
	Good value for money	4	3	0	1	1	-1	-3	-2
Accessible and inclusive for everyone	Ideal for large group bookings	-4	4	2	1	0	0	-1	-1
	Range of accommodation options to suit different budgets	-1	0	3	1	-1	0	-2	0
	Attractions and entertainment options nearby	-7	12	8	6	-3	-4	-7	-1
	Family friendly	1	6	1	-1	-1	0	-4	-2
	Accessible and inclusive for everyone	-3	-3	2	2	0	0	-3	4
Food and produce	Quality food and dining options nearby	2	-3	4	8	3	-1	-8	-2
Unique offerings	Offers something you can't find anywhere else	9	-4	-11	-9	-4	4	19	-2
Uncrowded	Uncrowded with people or tourists	9	-10	-12	-10	2	7	17	0

Relative strength

Relative weakness

Base: Aware of destinations n=1000

Source: FUNC_IMAGE Which of these destinations do you think…? Base: n=1000

Note: variance analysis shown.

SUMMARY

Brand Positioning

DOMESTIC TOURISM IN AGRITOURISM CONTEXT IS LED BY BEING A MEANINGFULLY DIFFERENT DESTINATION

Compared to the wider domestic travel context (TIM tracker), meaning and difference have higher contribution to brand power in the agritourism context. Meanwhile, being top of mind is less important (potentially as agritourism is a more considered choice).

WE HAVE A UNIQUE BRAND PROFILE IN THE CATEGORY THAT WE CAN LEVERAGE

Tasmania’s strength in meaning and difference has put us in an unique position in the category. This is a particularly positive result against our competition as we are seen as the most different destination brand within the context of agritourism

Although Tasmania is a less familiar and salient destination; our key strength lay in being a destination that offers travellers with the ability to “slow down and enjoy” through the agritourism offering. Tasmania also stands out for its connection with nature, and produce that is of superior quality.

Functionally, potential partnerships may also assist in owning the white space in “Good value for money”

8

Deep dive into key segments

Below are the key segments derived from reason of travel and past experiences

Segments definition

Travel reason

Agritourism first travellers

Agritourists claim they chose to travel to a destination specifically to do Agritourism activities

Destination first travellers

Agritourists claim they chose to travel to a destination first and then chose the activities before they arrived

On the Go travellers

Agritourists claim they decided to do agritourism activities after they arrived at the destination

Travel frequency

Heavy Agritourists

Participated in equal or more than 3 agritourism activities for “five or more times”.

Medium Agritourist

Participated in equal or more than 3 agritourism activities for “three or more times” and are not heavy agritourists

Light Agritourists

Participated in equal or more than 3 agritourism activities for “once or more times” and are not heavy or medium agritourists

Very Light Agritourists

Participated at least one activity and are not heavy, medium and light agritourists

Heavy agritourists and agritourism-first travellers are more likely to participate in broader range of activities

LAST ACTIVITY BY SEGMENTS

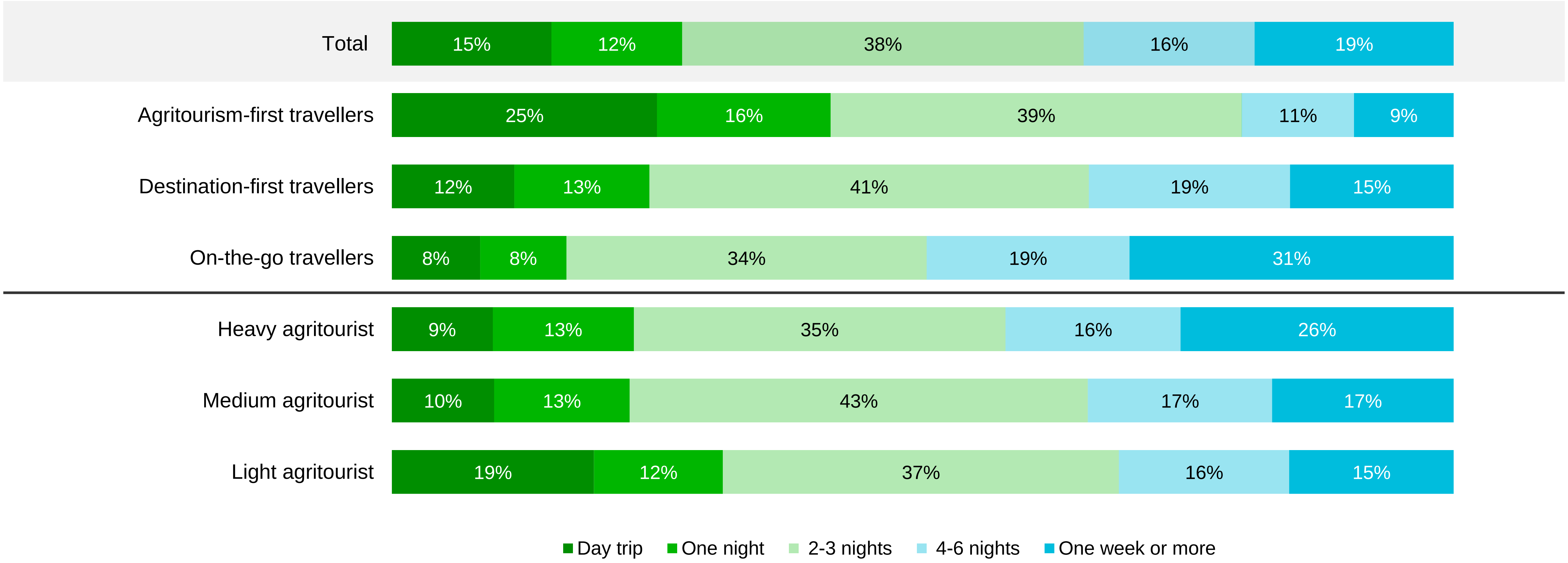
In order of past visitation	Total	Agritourism first travellers	Destination first travellers	On the Go travellers	Heavy Agritourists	Medium Agritourist	Light Agritourists	Very Light Agritourists
Visiting a café or restaurant that specialises in local produce	42%	30%	45%	53%	50%	44%	41%	28%
Local farmers'/ produce market	30%	26%	26%	38%	45%	27%	25%	27%
Tasting/ tours (e.g. wine, beer, spirit)	28%	30%	30%	25%	38%	28%	25%	14%
Food/ Beverage Festival that specialises in produce from the local region	14%	17%	14%	12%	20%	18%	10%	2%
'Pick your own' fruit/ vegetable	15%	24%	11%	10%	18%	17%	11%	16%
Hunting, fishing or catching your own food	11%	19%	10%	6%	15%	13%	8%	10%
Farm visit/ tour	11%	14%	13%	7%	17%	13%	8%	3%
Learning about farming activity/ produce	8%	12%	9%	4%	16%	10%	4%	0%
Curated meals using local produce	7%	7%	11%	5%	16%	8%	3%	1%
Foraging for wild food (e.g. berries, mushrooms)	5%	8%	4%	2%	7%	7%	2%	1%
Farm stay (on-farm accommodation)	10%	13%	12%	4%	13%	12%	8%	1%
Tours of European/ colonial heritage farming	6%	9%	6%	2%	9%	8%	3%	0%
'Make your own, take it home' experiences (e.g. Cheese making, gin infusions)	5%	9%	3%	1%	9%	7%	1%	0%
Cooking lessons using local produce	6%	10%	4%	4%	8%	8%	4%	1%
Tours of indigenous heritage farming	5%	8%	5%	2%	9%	8%	1%	1%
Base	936	323	278	335	223	287	332	94

KANTAR | TASMANIA COME DOWN FOR AIR

Source: LAST_ACT Now we'd like to understand a bit more about your last holiday within Australia that involved one or more of these activities. Which activities did you do on this trip?

Both heavy agritourists and on-the-go travellers are more likely to participate in longer trips while agritourism-first travellers participate predominately shorter trips

LENGTH OF AGRITOURISM TRIP (LONGEST TO SHORTEST)



KANTAR | TASMANIA COME DOWN FOR AIR

Source: LAST_LENGTH How long were you away on your last holiday?

Base: Total n=936; Agritourism first travellers n=309; Destination first travellers n=273; on the go travellers n= 340, Heavy agritourists n= 223, medium agritourists n=287, light agritourist n=332

Heavy agritourists and agritourism-first travellers have higher intention to participate in higher spend activities whereas lower spend activities are popular across all segments

NEXT ACTIVITY – INTEREST BY SEGMENT

In order of future intention	Spend	Agritourism-first travellers	Destination-first travellers	On-the-go travellers	Heavy agritourist	Medium agritourist	Light agritourist
Visiting a café or restaurant that specialises in local produce	Low Avg $	74%	77%	80%	88%	79%	73%
Local farmers'/ produce market	Low Avg $	74%	73%	76%	88%	76%	71%
Food/ Beverage Festival that specialises in produce from the local region	Mid Avg $	71%	73%	67%	82%	75%	64%
Tasting/ tours (e.g. wine, beer, spirit)	Mid Avg $	72%	72%	64%	82%	75%	64%
'Pick your own' fruit/ vegetable	Low Avg $	67%	57%	50%	72%	58%	53%
Farm visit/ tour	Mid Avg $	64%	54%	44%	62%	56%	52%
Curated meals using local produce	High Avg $	65%	58%	38%	68%	57%	47%
Tours of indigenous heritage farming	High Avg $	59%	53%	38%	60%	56%	42%
Learning about farming activity/ produce	Mid Avg $	60%	52%	35%	58%	56%	44%
'Make your own, take it home' experiences (e.g. Cheese making, gin infusions)	High Avg $	59%	53%	35%	59%	55%	41%
Farm stay (on-farm accommodation)	High Avg $	63%	49%	34%	57%	56%	41%
Tours of European/ colonial heritage farming	High Avg $	56%	51%	35%	57%	54%	40%
Cooking lessons using local produce	High Avg $	61%	48%	29%	53%	51%	41%
Foraging for wild food (e.g. berries, mushrooms)	High Avg $	61%	47%	30%	57%	52%	39%
Hunting, fishing or catching your own food	Mid Avg $	61%	46%	27%	55%	50%	38%

Source: NEXT_ACT Imagine you're dreaming up your ideal holiday involving Agritourism. How likely are you to do each of these activities? Base: total (n=1000)
*Note: Agritourism-first travellers n=323; Destination-first travellers n=278; On-the-go travellers n=335; Heavy agritourist n=223; Medium agritourist n=287; Light agritourist n=332

Heavy agritourists and agritourism-first travellers expect to understand their experiences at a deeper level – highlighting the importance of authenticity to these travellers

AUTHENTICITY (very important or extremely important %)

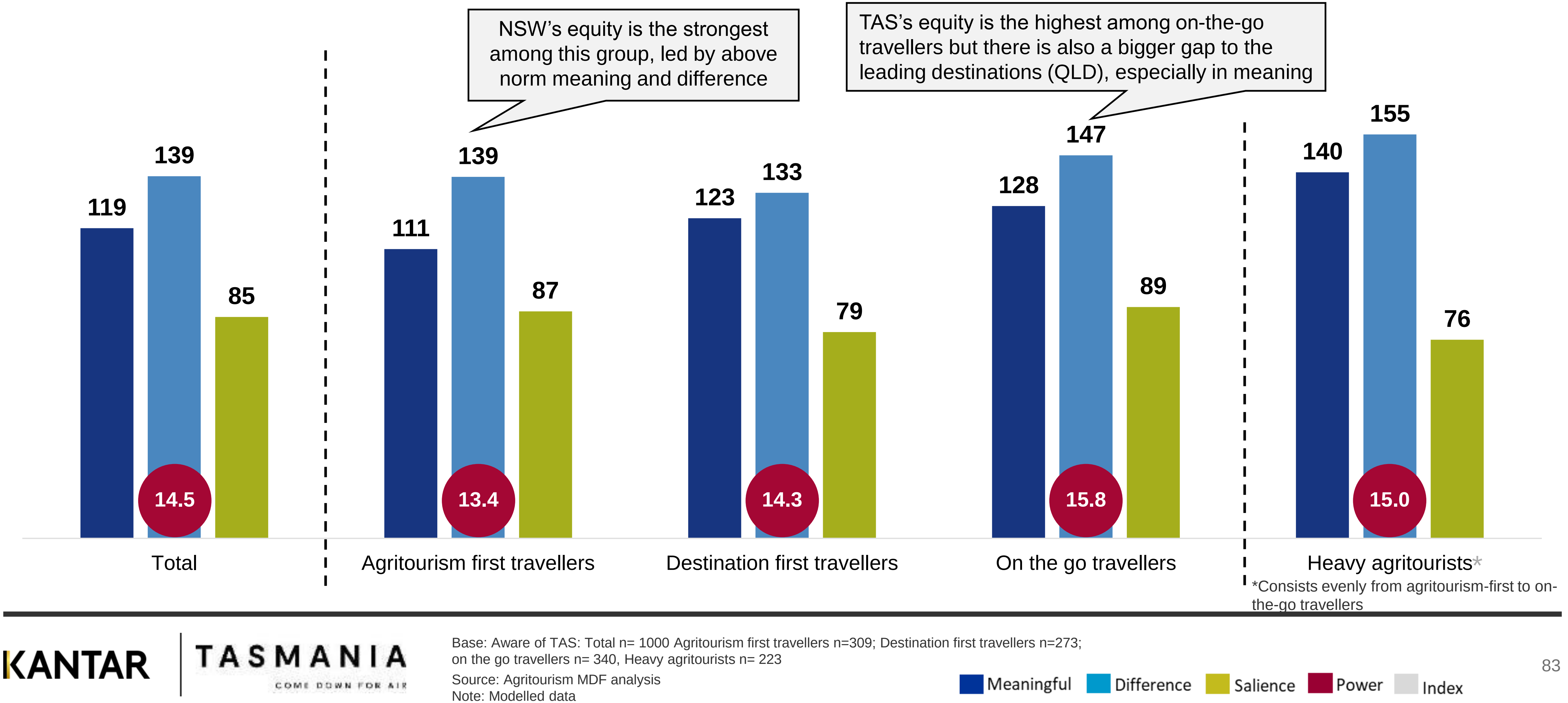
	Heavy agritourist	Medium agritourist	Light agritourist	Agritourism-first travellers	Destination-first travellers	On-the-go travellers
Understanding the story behind how something was made	64%	48%	37%	54%	46%	37%
Going to the origin of the activity (where is was made/produced)	58%	46%	35%	52%	45%	32%
Meeting the people who make/grow/farm/catch the produce or products I enjoy	57%	49%	36%	55%	40%	34%
Experiencing the particular activities of growing/farming/fishing/hunting	53%	45%	30%	53%	40%	25%
Speaking with people that sell agritourism products/experiences at different stages of my trip	51%	47%	30%	50%	40%	28%

Source: AUTHENTICITY How important are the following things in enriching your experience when you choose to engage with agritourism?

Base: Destination of last trip (n=936)

Interestingly, there is a gap in brand equity as well as meaning and difference between agritourism first travellers and heavy agritourists despite both have strong intention to participate in various of agritourism activities

BRAND POWER ACROSS SEGMENTS - AGRITOURISM



KANTAR | TASMANIA COME DOWN FOR AIR

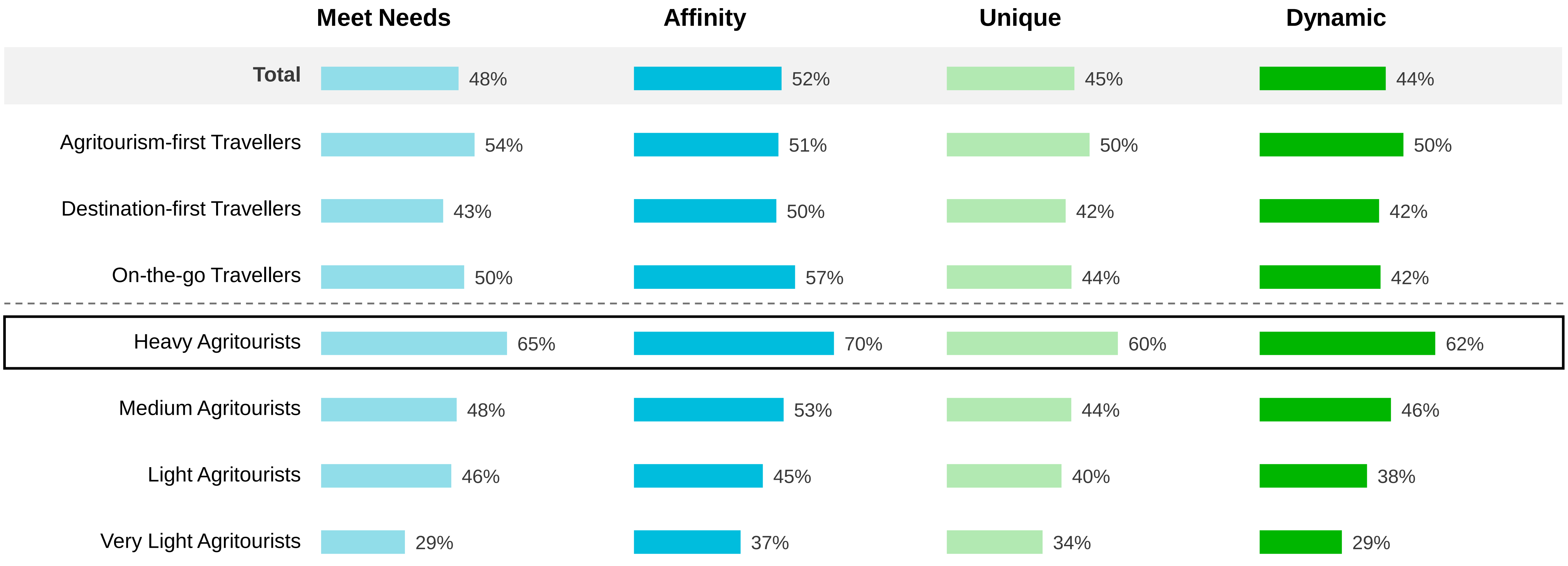
Base: Aware of TAS: Total n= 1000 Agritourism first travellers n=309; Destination first travellers n=273; on the go travellers n= 340, Heavy agritourists n= 223

Source: Agritourism MDF analysis

Note: Modelled data

Tasmania's performance in MDF metrics are more profound among heavy agritourists, indicative of our dominant position in the category

MDF METRIC OF TAS BY SEGMENTS – AGRITOURISM



KANTAR | TASMANIA COME DOWN FOR AIR

Source: MEETS_NEEDS_DEST, how well each delivers the main things you need from an agritourism experience or holiday. DYNAMIC_DEST, how much it sets trends for agritourism holidays. UNIQUE_DEST: how different it seems to the agritourism holiday destinations. AFFINITY_DEST: How do you feel about each destination?
Base: n= 1000

Our positioning remains similar across different segments. On-the-go and heavy agritourists lead the advantageous position in "Slow down and enjoy" and "Unique Offering"

COMPETITIVE BRAND IMAGE OF TAS – EMOTIVE – SEGMENTS VIEW

Ranked order of contribution to Power

		Total	Agritourism first travellers	Destination first travellers	On the Go travellers	Heavy Agritourists	Medium Agritourist	Light Agritourists
Habits and Ritual	Reconnect with friends and family	-10	-7	-6	-17	-13	-9	-10
	A place you return to time and again	-5	-3	-5	-7	-7	-3	-5
Relax and reflect	Relax and destress from everyday life	0	-1	0	2	0	-1	3
	Slow down and enjoy the simpler things in life	6	3	8	7	7	4	7
	Feel reinvigorated	-1	0	1	-2	0	-2	0
	Feel connected with nature	8	6	6	11	7	8	8
	Rediscover what's important to you	-2	-1	-1	-5	-2	-3	-2
Food and produce	Enriching experience where you can learn about produce/ food	3	1	2	5	3	3	3
	Produce that is superior in quality than other destinations	5	2	2	12	9	3	6
Unique offerings	Nature and wilderness like nowhere else	9	9	3	13	9	8	9
Authentic experience	Connect with authentic people	-4	-4	-6	-3	-9	-2	-3
	Create lasting memories	-4	-2	-4	-4	-1	-3	-6
	Sense of achievement and satisfaction	-3	1	-1	-8	-2	-2	-4
Agricultural experience	Agricultural activities/ experiences like nowhere else	0	-1	1	1	2	0	-1

Relative strength

Relative weakness

Base: Aware of TAS: Total n= 1000 Agritourism first travellers n=309; Destination first travellers n=273; on the go travellers n= 340, Heavy agritourists n= 223
Source: EMOT_IMAGE Which of these destinations do you think…?
Note: variance analysis shown.

Value for money has become a key strength for Tasmania among medium and heavy agritourists. Easy access has become a key barrier especially among on-the-go travellers

COMPETITIVE BRAND IMAGE OF TAS – FUNCTIONAL - SEGMENTS VIEW

Ranked order of contribution to Power

		Total	Agritourism first travellers	Destination first travellers	On the Go travellers	Heavy Agritourists	Medium Agritourist	Light Agritourists
Habits and Ritual	Easily accessible by car or vehicle	-12	-8	-11	-19	-13	-13	-14
	Good value for money	4	3	5	4	6	7	2
Accessible and inclusive for everyone	Ideal for large group bookings	-4	-1	-5	-6	-5	-2	-3
	Range of accommodation options to suit different budgets	-1	-1	-4	1	-2	-2	-1
	Attractions and entertainment options nearby	-7	-7	-4	-10	-7	-7	-6
	Family friendly	1	0	3	-1	0	1	1
	Accessible and inclusive for everyone	-3	0	-5	-4	-6	-2	-2
Food and produce	Quality food and dining options nearby	2	3	2	3	7	0	2
Unique offerings	Offers something you can't find anywhere else	9	7	10	10	13	7	9
Uncrowded	Uncrowded with people or tourists	9	4	9	17	8	10	10

Relative strength

Relative weakness

Base: Aware of TAS: Total n= 1000 Agritourism first travellers n=309; Destination first travellers n=273; on the go travellers n= 340, Heavy agritourists n= 223
Source: FUNC_IMAGE Which of these destinations do you think…? Base: n=1000
Note: variance analysis shown.

SUMMARY

Deep dive into key segments

AGRITOURISM ACTIVITIES DIFFER IN ENGAGEMENT ACROSS SEGMENTS

Heavy agritourists and agritourism-first travellers engage with a broader range of activities.

There is potentially an opportunity for Tasmania to develop their offer across a more broad range of experiences targeting those most engaged.

SPEND AND LENGTH OF TRIP ALSO DIFFER ACROSS SEGMENTS

Both heavy agritourists and on-the-go travellers are more likely to participate in longer trips while agritourism-first travellers participate predominately shorter trips

Heavy agritourists and agritourism-first travellers have higher intention to participate in higher spend activities whereas lower spend activities are popular across all segments

MAINTAIN OUR ADVANTAGEOUS POSITION AMONG HEAVY AGRITOURISTS AND LEVERAGE THEIR INFLUENCE

Tasmania holds a strong position in meaningfulness and difference among those who know what agritourism activities are truly about (our heavy agritourists).

We need to maintain our position among this group as they take longer trips, higher spend and intend to participate in a wide range of agritourism activities. They are a key group to leverage their influence and attract other agritourists through WOM and positive feedback.

Appendix B: Trends and competitive landscape review

Findings from stakeholder interviews and desk research

Summary of key learnings

- Agritourism activities are increasing in travel because consumers are looking to connect with nature, communities and immerse in authentic local experiences.
- The emerging trend is to be immersed in nature and experience the spirit of the land through food and culture. This is where agritourism can shine.
- Primary competition is from markets with rich heritage and culture. These markets have an established country brand image that tie together with their agritourism experiences.
- Emerging markets are also entering competition and changing the agri landscape with urban farming techniques, digital touchpoints and better accessibility of remote, rural spaces for their target audiences.

Opportunities for Tasmania

- Collaborate with other agri and non agri businesses to create a unified experience
- Leverage of Tasmania's branding, already strong ties to Agritourism
- Every field has a unique story to tell – personify a unique voice and story of Tasmanian fields that cannot be experienced anywhere else

Key learnings from stakeholder conversations

Our unique assets set the stage…

Tasmania has **unique assets** that are nationally and globally unrecognised

- Climate
- Purity
- The best in sparkling wine, dairy, aquaculture, olives, cheese
- We are remote, offering safety and peace of mind – the perfect place to take a breather and connect or reconnect with nature

What is holding us back?

- The **number of producers** in each industry *e.g. we only have one olive grove and a handful of cheesemakers*
- **Quiet achievers** – we are not good at talking ourselves up
- State and federal **regulations** on food
- **National and international recognition** of all we have to offer – by State and region

What do we need to do to compete?

- **Collaborate** to create a **meaningfully different and distinctive agritourism proposition** – food, wine, experiences and accommodation
- Create a **compelling State and regional narrative** to help ensure we are competing nationally and internationally (rather than locally)
- **Encourage more businesses** to collaborate and create experiences enabling us to build a distinctive agritourism narrative

Who are we competing with?
Understanding our competition and our right to play

Pre-Covid: Understanding who is *coming to Australia* helps identify our competitive set and consider the locations and experiences we will need to differentiate against

Where people are coming from: UK, France, Italy, Japan, Taiwan, Singapore, Malaysia
They are also traveling to….

Global countries with a long-established agritourism history and credentials

- Italy
- France
- Ireland
- Portugal
- USA

Global countries with a new or emerging agritourism image

- Japan
- Taiwan
- Jeju

Source: Tourism Australia | Zooming in on the highest number of people on their second visit (excl business and family)

KANTAR Tourism Tasmania

Pre Covid: Understanding *where Australians were travelling to* helps identify how we need to position our offer and experience to compete

The most population global destinations by country and city

Top countries
China, NZ, UK, USA, Japan, Singapore

Top cities
Bangkok, Paris, London, Dubai, KL

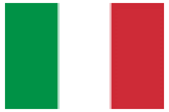
What's the appeal?

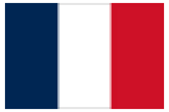
- Affordable SEA escapes
- Places with a strong cultural history
- Wine and food trips in renowned locations
- Asian food tourism

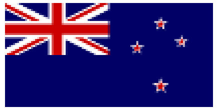
Source: Tourism Australia

KANTAR Tourism Tasmania

What can we learn from our competitive set?







Authentic immersions true to culture people and land

Rustic, small, niche, family owned and operated

Wine experience authentic to the region and climate

Refined, discerning, branded experiences

Branded experience, clean green image

More commercialised, tourist image – not niche and homely but more sophisticated and loud in nature

Engaging, entertaining experiences

Tasmania's right to play | Niche, small batch, remote, not the most accessible

It's the slow life, remote, distant, not accessible – even within the state, one region is remote and distant from another. A lifestyle that is authentic and grounded, wholesome, honest, modest and down to earth. All agritourism experiences are from local people who own the businesses and run and operate themselves

What are our perceived strengths by region?

Is there an opportunity to dial up a distinctive profile for this side of the island?

North west region: Farmland e.g. beef, lamb, dairy and farm activities

Launceston and surrounding: Farmers markets; surrounding vineyards; best for foodies

Freycinet and surrounding: Aquaculture

Hobart and surrounding: Farmers markets; surrounding vineyards; orchards/cider

Bruny Island: Cheese

Understanding travel and agritourism

The industry view vs the consumer view highlights differences in meaning

INDUSTRY LENS

- Additional source of income for agritourism vs main business
- Food grown and produced on the land
- Owner operated vineyards with wine made from the farm
- Farm/ animal interaction
- Pick your own
- Honesty box
- Fishery/ aquaculture tourism

- Farm stay
- Farm tour
- Farmers' market

CONSUMER LENS [Beyond Unsure]

- Local food
- Vineyards
- Food and beverages with locally grown elements e.g. either grown or specific local ingredients

GLOBAL INDUSTRY LENS

- Horseback riding
- Farm weddings
- Concerts
- Agri museum
- Wildlife experiences
- Playgrounds e.g. mazes, escape rooms
- Agri land hobbies e.g. fishing, kayaking, hunting

Consumers see agritourism elements as a point of differentiation vs other types of tourism

It’s adds an element of conscious consumption

- In **food tourism** it brings purpose and goodwill to what I’m consuming e.g. supporting local
- In **accommodation** it creates a perception of sustainability
- In **activities**, it educates about the process, the culture and the people
- A **rural escape** – beach escapes are fun, urban escapes add variety and flavour, rural escapes are about taking a breath and slowing down

Agritourism is growing because consumer needs in travel are evolving

Authentic immersion

Activities like pick your own and make your own have grown in the past few years

People want to engage in a romanticised version of what some locals do in their daily lives

It's no longer just about watching, but taking part and being involved

Remote, unique experiences

Experiences slightly off the beaten track have started to feature more in travel blog content e.g. Bubble Gum Lake, South Australia

As the Instagram way of travel has become the norm, people are moving away from big known attractions to niche experiences

Taking photos and documenting experiences that might be hard to get to or not all can experience provides social clout and status

Purposeful travel

Asia is seeing a growing trend towards experiences with a purpose. Asia's top 50 such as Locavore differentiate on hyperlocal agri elements and have become reasons to travel

Consumers are starting to realise the environmental and social costs of travel, with some making a conscious effort to integrate purposeful travel activities – they are demanding it from businesses by voting with their travel wallet

Renewal and restoration

People are looking for remote getaways and alternative lifestyle experiences – amplified by a need for security and peace of mind driven by Covid

Urban spaces are becoming more dense and travel is becoming harder. With more urban stressors affecting physical and mental wellbeing, people will start to look for escapes to restore, heal and renew on a regular basis. Remote, unplugged and inaccessible to heal body, mind and spirit

Outstanding in the field caters to the modern foodie

Outstanding in the field holds events, dinners and parties in rural landscapes from Mt. Fuji to Californian Beaches (Click here)

- 15 countries, across multiple regions and states, sold out events
- Iconic table setting brings to life the land and the scenery - farm to table harvest dinners
- Ingredients foraged from the land created by renowned chefs

"A farmer's bounty, an artisan's craftsmanship, a fisherman's catch. A unique group of people gathered in one place for one moment to share the most universal human conversation: a meal. Since 1999, we've set the table at farms, beaches, vineyards. mountain tops, fishing docks, city streets, and other extraordinary sites"

Why it's interesting

This embodies the notion of authentic immersion with the land and the people who live in it. It brings together stories and the culture of the land in an experiential way; each experience is unique because each field has a different story to tell, and a different purpose to highlight

Hawaii immerses the traveller in indigenous styles of agritourism relevant food

A rising star as a foodie destination in the states. Hawaii blends in agri with indigenous culture

- Locally grown produce, a melting pot of flavours
- Indigenous cooking style – ingredients and style both incorporate the Hawaiian culture
- Hawaiian luau a key attraction to complete a foodie tour – underground style cooked food using freshly caught and grown ingredients

Why it's interesting

Hawaiian food heroes the cook with an intention. The food is created as a sensorial touchpoint for experiencing the stories of the people and the land, and a learning opportunity for indigenous culture

Transitioning to the new way of travel

Learn from dominant players — Understand emerging needs

Destination first anchored in country or regional branding

- A collection of agritourism and non-agritourism businesses combine to create a unified, globally recognised experience
- Country or regional branding becomes the beating heart – agritourism activities one of many touchpoints delivering to this image

Unique, niche attraction first, then stumble upon others

- Differentiated attractions create a reason for people to visit a particular country or region
- Examples include: cherry blossom in Japan, Amsterdam tulip fields
- Seasonality [now you see it, now you don't] drives a sense of urgency and itinerary planning

Escape from the world and into the great outdoors

- New prestige is being at one, alone with nature - with local immersion linked to storytelling
- Rural romanticism will enter urban spaces

Italy demonstrates a progression to an emergent travel style while remaining true to its brand core

Learn from dominant players — Understand emerging needs

Government play an active role

- Agritourismo Italia Provides resources for businesses e.g. trademark manuals for farms
- Dials up rural landscapes in marketing communications e.g. accommodation site specific for farm stays

Breathtaking agricultural landscapes

- Regional marketing anchors the lands and the fields unique to them
- Landscape blends in with history and culture differentiating at a global scale

Wine and food cultural destinations

- On the bucket list of any foodie e.g. hand made pastas, Napoli pizzas
- World renowned wine e.g. from Sicilian wine to Tuscany
- Food tourism relies on agri for differentiation
- Delivers to needs of local immersion

The world's best farm-stays

- Instagrammable rustic beauty
- Experiencing slow food, slow life, relaxed living
- Delivers to emerging needs of slow living

Why its interesting

All conversations point to Italy as a benchmark for Tasmania

Italy leverages its cultural heritage to create a competitive right to play in agritourism

The history, culture and people connect with the land

The products and experiences personify this rich heritage across all tourism touchpoints from architecture to agriculture

Thought-starters for value proposition development

What distinctive brand assets can we leverage?

- Authentic immersions
- Remote, unique experiences
- Purposeful travel
- Renewal and restoration

What distinctive cultural elements can we elevate?

- Indigenous
- Craft
- Foraged ingredients unique to Tasmania

Destination first: Agritourism is a touchpoint for region/country brand

New Zealand tourism architecture overview

Clean green image

- 100% pure
- Destination for farm to the table
- Clean air, clean climate

Wine that stands among the best

- Regional wine recognised at a global scale
- Lesser known vineyards take advantage of the halo

Fresh produce

- Bluff oyster takes advantage of clean climate and fresh waters
- Farmers markets are must visits
- Lesser known towns like Matakana makes the most of collective farmer’s market image

Halo effect benefits smaller businesses

- Bracu olive grove known as a must visit restaurant
- Puhoi valley a must visit for cheese lovers traveling the Wellington region

Why its interesting

NZ is a case study on how brand must always come first

Whether State or regional, it’s important for agritourism activities to align with the broader brand image to create a unified experience. Agritourism along with food and adventure tourism become brand touchpoints that deliver to the country image

Waiheke Island

Takes on halo effect from global New Zealand wine image

Waiheke is known for high quality red wines based on Cabernet Sauvignon, Merlot, Malbec and Cabernet Franc grape varieties. There are around 30 boutique wineries scattered about, many with tasting rooms, renowned restaurants and breathtaking views

- 10 acre estate, crafted from vine to bottle, award winning restaurant
- Family owned and operated
- Limited edition releases, not found outside of Waiheke
- As many locally produced ingredients for food as possible

Why it's interesting

Waiheke is not known globally as a wine destination, but it is differentiated for people who love wine. This example plays to consumer needs of food tourism first and then brings in agritourism elements to differentiate – a reason for someone who has been to many vineyards to come specifically to Waiheke

Bluff Oysters putting bluff on the world map

- Seasonal, short supply, hard to export long distance
- Central point of regional peak seasons
- Bluff oyster festival brings to life seafood industry of the region as well as shines light on local produce through food
- Takes clean image of NZ to create fresh fisheries halo effect

Why it's interesting

Bluff has made it into the world map because of the broader tourism architecture of NZ to give them credibility. Without the halo image of pure NZ and the food and wine image built from the wine and food industry as a core, smaller players like bluff would find it difficult to make it on the world map.

Tourism bodies dial up agritourism touchpoints of the brand architecture

We discussed Oregon Tourism

The tourism body has a B2B agri arm/sub brand

- Provides resources for new businesses e.g. planning templates, tips for council approvals, etc. (Click here)
- Actively headhunts businesses and farms to take part in agri tourism activities
- Provides branding and marketing expertise for agri businesses to differentiate

Why it’s interesting

The Oregon architecture is an example of how different businesses from a similar industry can provide a brand image through power in numbers. It highlights the role a tourism body can play beyond regional marketing and branding. It signals a need in providing expertise for existing agri businesses to grow as well as ensuring new players secede

Oregon Cheese trail, USA

16 creameries open to public (Click here)

- Make your own cheese, learn about global techniques and those unique to Oregon
- Equipment e.g. glasses from Oregon distilleries
- Includes partnerships with these distilleries to offer craft beverage experiences

Why it's interesting

Unlike other wine and cheese trails, Oregon creates an experience using other businesses. It recognises that along with the cluster of cheese experiences, people look for complementary offer like food, and alcoholic beverages. The additional partnerships of the cheese trail all work together to create a differentiated foodie experience. The itinerary planning and logistics become the role of the tourism body

Portland – the paddock to plate destination of Oregon

- Cuisine defined by rich farmland - Restaurants with regional farm produced ingredients offer fresh and quality differentiation
- Cluster of paddock to plate restaurants renowned across the States as must-visit foodie destinations
- Food festivals and farmers markets dial up agri food tourism
- Other business leverage agritourism elements for differentiation e.g. home brew gins, locally foraged cocktail garnishes, etc.
- A piece of the surrounding fields weaved throughout urban living

Why it's interesting

Different businesses have one common goal – to raise the image and profile of the farmland surrounding urban Portland. This delivers to needs of travel and especially engaging in foodie culture with a purpose

Thought-starters for value proposition development

What assets can be borrow or build on from brand Australia or Tourism Tasmania?

How can agritourism businesses align with these assets to create a distinctive experience?

What non-agritourism businesses can we collaborate with – and why?

How can we link agritourism to the land and food culture of Tasmania?

What role can Tourism Tasmania play?

Attraction first: Agritourism activities a reason to travel the region

Rancho Margot, Costa Rica

Off the Grid paradise offers holistic, personalised experience ([Click here]())

- Luxury surrounded by rainforest
- Organic farms within a small distance provide ingredients for meals and buffets
- Guided tours include education and hands on experience on these ingredients e.g. cow milking, fishing and gardening
- 100% self sustaining, upcycled and recycled materials

Why it's interesting

Being able to take part in farm activities create an authentic immersive experience. But this location is more than that. People will travel here for the accommodation. This epitomises the need for purposeful travel and sustainable being a new status symbol. The holistic experience creates an ultimate escape away from the urban hustle and bustle

Burnside farms seasonal events, USA

Seasonal experiences (Click here)

- Spring – plant tulip bulbs with the family, local live music, play areas and Dutch themed hang out spots
- Summer – the only sunflower maze in the region, pick your own sunflowers and make your own bouquet
- Fall – Pumpkin maze, pumpkin carving activities, markets set up by local florists, orchards and farms from the region
- Winter – freshly cut Christmas trees along with Christmas tree markets featuring local arts and crafts, food etc.

Why it's interesting

Seasonal events are a great way to create 'limited edition' style experiences unique to the destination and its climate. They create a reason for people to return because the land has different faces in each season. This attracts both locals and tourists to continue returning

Mendocino applies both routes

Destination first

Attraction first

California as a state known as an agri food destination
- One of the best in wine in USA – Nappa Valley
- Unique traditional cheese methods
- Farm to table culture even in urban areas
- Sustainability is a status symbol

Harbour House Inn – Michelin star award gains competitive strength from regions' Agritourism success but also elevates profiles of smaller businesses. Although this as the main attraction is not agri, smaller towns and businesses benefit off the back of this

Collective of small businesses create unique agri experiences (click here)

Attraction first agritourism is where the earth becomes the beating heart of the tourism brand in that region

There's Vietnam then there is Sapa

One of 7 natural beauties of SEA – unique due to climate and soil makeup, minerals and slopes

A must for hikers and views change seasonally – not one experience is the same as another

There is Korea, then there is Jeju

Jeju is the beauty spa hub of SEA

Volcanic ashes and soil make ingredients from Jeju fresh and clean and detoxifying

People can find unique, small batch ingredients for beauty from the volcanic ashes

There is China, then there is Yunan

Most Chinese produce suffers from a negative image from the country's poor pollution quality measures

Yunan however is the rising star in clean and fresh produce from China

Set on high hills, Yunan is seen as one of the purest areas in the region with produce having an equal standing with Taiwan

Why its interesting

Conversations around destination first places e.g. a Michelin star restaurant with local produce. However, like Mendocino, these bring business to surrounding agritourism activities

However, these regions demonstrate agri land on its own can be a beating heart where the businesses on the land personify the character and spirit of the soil. The characteristics of the earth we stand on give these destinations a unique differentiating point. The businesses on the land leverage the land's persona

Sapa and Yunan demonstrates an agri first destination brand can stand uniquely apart from the national brand

Jeju demonstrates agritourism does not have to be food and wine, but can encompass categories from beauty to wellbeing

Thought-starters for value proposition development

Stakeholders agree Tasmania has a unique climate, soil and waters…

What distinct landscapes can we use to bring this to life?

What makes these landscapes unique, and unlike any other place in the world?

How can agritourism businesses personify these landscapes and create unique experiences to drive multiple visits?

Understanding emerging travel needs

The context: the dominant bubble for the next 12 months and beyond will be domestic and New Zealand

48% of Australians have expressed the desire to travel overseas once the borders are lifted and hygiene is maintained

However, this is unlikely to happen until mid-2022

Domestically there is a high desire to travel to States where transmissions, case numbers and the threat of border closures are low

When it comes to travel, people crave reconnection but value safety

- United back together with family and friends
- Focused on the community – local/Australia-made already growing in demand
- Connection back to nature and land

Our dominant competition in the short term: Regional agritourism and New Zealand food and wine tourism


The new prestige is in
being left alone in nature

The new immersion: Casa na terra

- Boutique, separated room
- Designed by Manuel Aires Mateus
- Blended in with natural surrounding – disappears in the landscape
- Designed for silent living

Why it's interesting

Hotels are being designed to seamlessly integrate with nature and the spirit of the land. Each room here is a unique experience, and far away from others. It creates a feeling of being alone, and one with nature in a super premium, luxurious way

Alone with either myself or with my bubble

A regular second home

Membership models for exclusive destinations and private experiences

Luxury travel clubs created curated, small group experiences

Hotels are creating subscription stays to encourage people to return

Distance is luxury

Hotels are becoming self-cocooning pods – a place where you can work, play and socialise

Hotel rooms are becoming living spaces – not just a place to sleep

Nature is premium

Integration into nature a nod to an elevated premium expression of sustainability – respecting your surroundings, blending in with nature

Hotel rooms, restaurants and bars all incorporating a piece of nature indoors but also blending their external surroundings with the environment

Thought starters for CVP

A regular second home

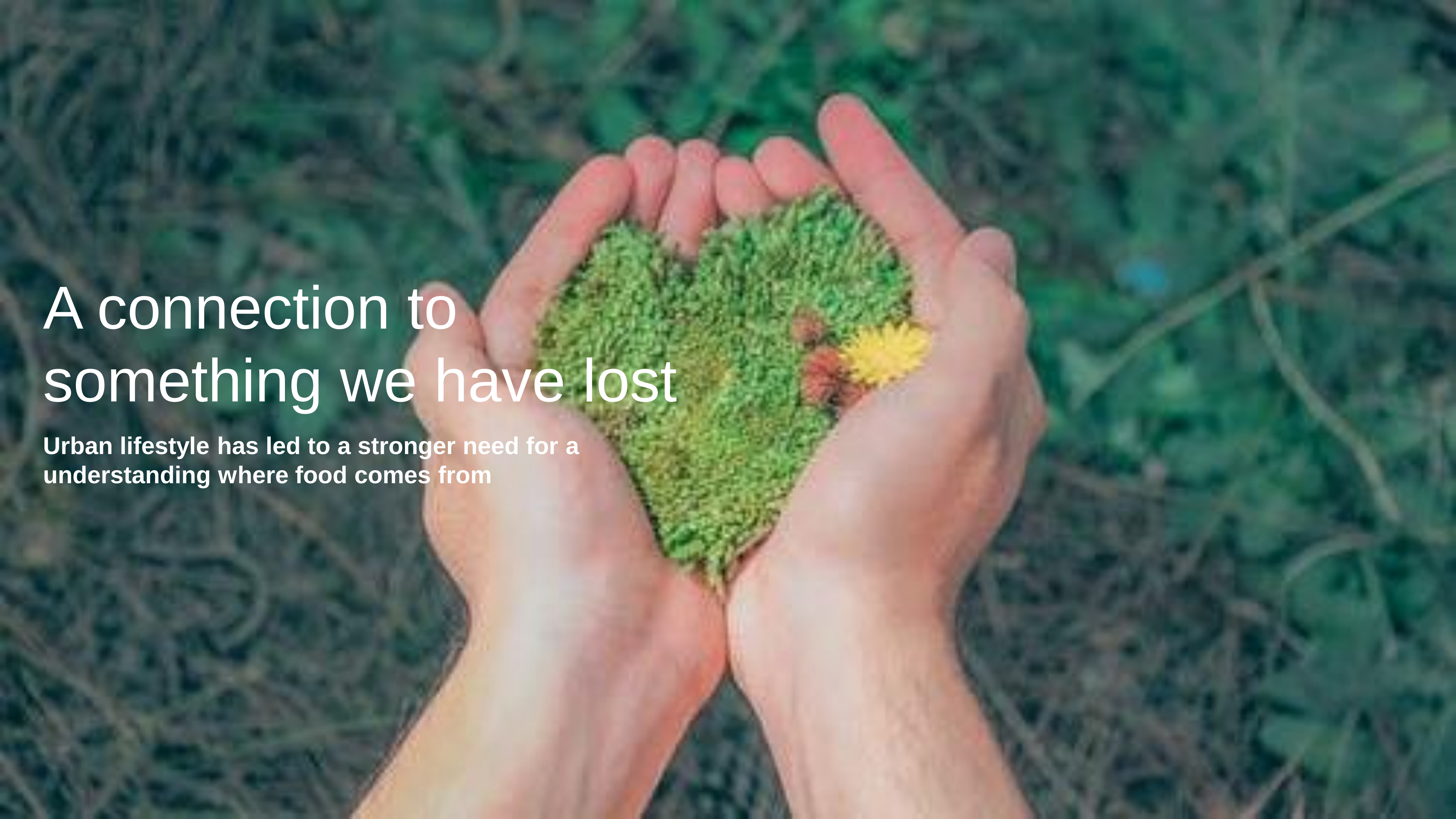
Subscription models are growing in FMCG – can we replicate it in tourism? What about beyond accommodation? Subscription models for pick your own?

Distance is luxury

AirBnB and Uber both align to a growing need to own less and share more. If accommodation is a home in my escape, can I come back to my farm stay ‘home’/landing pad without owning it? Can it somehow be customised to me every time I return?

Nature is premium

Can we elevate accommodation, restaurants or any physical agri spaces by bringing in elements of local materials and local craftsmanship? Can we talk sustainability in a way that is unique to Tasmania?



A connection to something we have lost

Urban lifestyle has led to a stronger need for a understanding where food comes from

Three key trends impacting the future of agritourism in Tasmania

Safety and security

Uncertainty from the pandemic will lead to a reprioritisation of needs with safety and security both physical and mental being on top of mind

The consumer need

Healing and restoring will start to become a habit both at home and while traveling

Tasmania's competitive right to play

Remote, one of the safest places during the pandemic, in its own bubble

Collective community

The Covid-19 pandemic has driven a renewed appreciation of local community, with people of all ages gravitating towards collective conservation over individual preservation

The consumer need

Hyperlocal will start to play a stronger role

Tasmania's competitive right to play

Sub regions have different agri image, sourced, niche, small batch rare ingredients and products across food, beverages, lifestyle and beauty

Sustainability elevated

From better for me to better for us mindset. Sustainability and clean living will go hand in hand. This will be the new status clout

The consumer need

Minimal living the new status. Tiny homes, sustainability in luxury and nature being premium will all merge into unified experiences

Tasmania's competitive right to play

Clean climate, unique soil, freshest produce in the world, small, remote self sustaining island


Rural romanticism will
enter urban lifestyles

The Sundowner, Singapore

Urban rooftop beekeeping farm (Click here)

- A serendipitous stumble upon – by local knowledge only
- Rooftops of traditional shop houses
- Visitors must stumble through ponds and aquatic plants to get to the farm section
- Potting mix made from recycled waste
- Rope and basket pulley system to deliver supplies to restaurants on the street to reflect rural lifestyle
- Can book hands on urban farming courses to get up and close to beehives
- Iconic wedding, events and private cinema venue

Why it's interesting

Even tech advanced places like Singapore is investing in creating a rural lifestyles in urban areas. This demonstrates a growing need for urban consumers to connect back to origins of food and slow life

Rural romantics are becoming influencers

- Digital escapist content and escapism from the comfort of urban homes - Liziqi captures rural life with highly stylised digital content
- Online workshops on handicrafts and retails farm style products

“In today’s society, many people feel stressed. They face a lot of pressure in life and at work. When they watch my videos at the end of a busy day, I want them to relax and experience something nice, to take away some of their anxiety and stress.”

Why it’s interesting

Many raised concerns about an activity not being agri if one isn’t physically standing on the land. But post covid and growing urbanisation, people will look to experience the romance and slow life of agri through digital content

Emerging markets: Competition is rising from unconventional regions

Established players in North and South America, ANZ and Europe have enjoyed a dominant position globally

However, the dragon economies such as China, Taiwan, Japan, South Korea (Jeju) are dialling up their game in agritourism

Following their lead, developing nations are starting to play a stronger competitive role than before

Important to make experiences convenient and accessible

Mini's mini nomad hotel (Yunan Region, China) creates an accessible image yet keeps the niche, isolated perception of agritourism

- End to end service – can include driver
- Pre packaged experiences
- Includes travel activities, food, glamping style camp
- Customised countrymen equipped cars
- A one stop shop

Why it's interesting

Many remote, agri destinations have accessibility challenges. As a result they miss out on a large number of tourists. This example demonstrates how both accessibility and a niche remote experience can be achieved with collaboration with brands and creating jobs such as drivers and translators

Thought-starters for value proposition development

How can we become more accessible without losing our essence of remote, niche, premium experiences?

How can we fuse agritourism experiences in urban environments?

What agritourism narrative or experiences should we amplify to help establish a unique agritourism strategy?


Experiencing the soul of the land we stand on.
Every field has a story to tell

Opportunities for tourism Tasmania in activation

Cocreate

- Can we have a serviced based models to build up and provide expertise to existing businesses?
- Can we recruit/head hunt agri businesses to enter tourism?
- Can we provide more resources to help businesses operator?

Benchmark examples: Oregon and Hawaii tourism

"We know agri, we don't know tourism. We need the expertise from Tourism Tasmania to tell us what the trends are and what the consumers want and how to do the marketing"

Curate

- Can we connect non agri businesses with agri businesses to help them differentiate?
- Can we bring together different businesses in agritourism to create unique experiences?
- Can we feature hero/lesser known businesses somehow?

Benchmark examples: Outstanding in the field

"We are not good at complementary services or complementary offers to create a total experience. That's something Tourism Tasmania can help with"

Connect

- Can we connect local art, craft and talent with agri businesses to elevate the hyperlocal experiences?
- Can we from partnerships with brands to create a prestige/premium offer?
- How can we enhance itinerary planning?
- How can we feature agritourism in urban areas?

Benchmark examples: Mini cooper in Yunan, Ranch Chayote accommodation

Key opportunities for Tasmania

Clusters of experiences to create a unified offer

People look for specific types of experiences e.g. relaxing weekend and curate a different activities to come together and give them that experiences. Therefore, agri businesses alone cannot survive without collaboration

Tell cultural stories through agri

People are looking for elevated food experiences – things that connect them to the unique stories and culture of the land and people who live on it. Agri businesses have an opportunity to tell historical stories through food, ambience of physical spaces and accommodation

Build a safe bubble to explore the outdoors

People are looking to travel unplugged, go off the grid and immerse themselves with nature. Live the simple life like the golden years awayu from the pressures of urban lifestyle. They want to feel like they are far enough yet close enough. They want to feel like they are traveling away but with peace, safety and security in mind

Incorporate agri elements in non agri spaces

Consumers don't have specific definitions for agritourism and look for elements of agri in all experiences. They look for agri elements in urban spaces and food as well as elements of agri to elevate other experiences like slow food and sustainability

Create satellite of experiences

Hero agritourism experiences but strengthen and elevate with complementary non agri and agri offers e.g. pair wine trail heors with cheese, food, spas and activities

Link indigenous and colonial history with the land

Use agri touchpoints e.g. accommodation, culinary, beverages, activities and accommodation to bring life colonial history and indigenous culture. This will elevate the experience and differentiate them globally and at a regional level

The ultimate getaway for the bohemian at heart

Immerse people in a different, slow living style. Connect them with local communities, small batch items and allow them to take part and take away experiences that cannot be replicated in any other parts of the world. And... make it easier for people to come back through seasonal experiences, subscription models and better accessibility of experiences

Link with broader tourism architecture

Essential to take elements from broader Tasmanian brand image to differentiate agri experiences but also for agri experiences to enhance and differentiate the Tasmanian image. It's a mutually beneficial relationship. Furthermore, use digital and urban spaces as touchpoins for dialing up agri experiences

Recommended strategy: expressions of rural romanticism linked with broader Tasmania brand image