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Drivers of regional agritourism and food tourism in Australia

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Disclaimer

This report is not intended to be a comprehensive study of all agritourism and food tourism enterprises in the case study regions. Businesses cited in this study have been chosen to represent the variety of agritourism and food tourism businesses and no particular endorsement of one business over another is intended. Opinions expressed by participants in this study do not necessarily reflect the opinions of the researchers.

Executive summary

Agritourism and food tourism have been a part of the rural and agricultural landscape in Australia for some time. Recently there have been more coordinated regional approaches to agritourism and food tourism as a strategy for growth and improving the resilience of individual businesses or rural communities. In this context, the Department of Agriculture, Fisheries and Forestry requested this study to improve understanding of the drivers and barriers to regional agritourism and food tourism in Australia.

‘Regional agritourism and food tourism’ refers to the act of going to a region to visit a working farm or other, farm or food-related business (including restaurants, markets, produce outlets and natural attractions) for enjoyment, education, or active participation in activities and events.

Research questions

The study addressed the following questions:

1. What are the features and benefits of regional agritourism and food tourism?
2. What are the key drivers and barriers influencing regional agritourism and food tourism?
3. What is required to generate successful agritourism and food tourism in a region?

To answer these questions, a desktop review was undertaken of 10 regions where agritourism and food tourism occurs. This was followed by detailed case study assessments of six regions. The regions were the South West (Western Australia), Eastern Gippsland (Victoria), Tamar Valley (Tasmania), Northern Rivers (New South Wales), Orange (New South Wales) and Tropical North (Queensland). The case study assessments included interviews, a focus group in each region and an online survey. Results are detailed under the headings below.

Features and benefits of regional agritourism and food tourism

Regional areas that are successful in agritourism and food tourism tend to display a common set of features, including access to accommodation, appropriate infrastructure and proximity or easy access to nearby urban areas. Agritourism and food tourism regions often present appealing ‘lifestyle drawcards’ which include food and agricultural-based experiences. These include food and wine production and consumption opportunities, aesthetics, rural culture, and farm-based recreational activities. These features of agritourism and food tourism are underpinned by a range of motivating forces and institutional drivers, which are explored in detail in this study.

Agritourism and food tourism enterprises can allow farmers to increase their farm-related income, through various forms of enterprise. Enterprises may feature or add value to traditional food and fibre products. Alternatively, some may have little to do with agriculture directly and provide recreation, nature-based, or educational experiences and products. Some can be labour and resource intensive, while others require few inputs. They can operate seasonally or year-round. They all have a common theme: they help farmers stay on the farm.

Through agritourism and food tourism experiences, consumers increase their knowledge of primary production and farming techniques. They can appreciate the aesthetic experiences—what they see, taste, hear, smell, and feel—and the learning opportunity. This kind of tourism increases their connection with growers and rural landscapes. Business operators in this study suggested that Australia’s urbanised populations have an increasing desire to connect to the farm. This gives willing farmers an opportunity to tap into a new market.

Observations of agritourism and food tourism businesses in this study

The agritourism and food tourism businesses studied were mostly family run—by both farmers and people from other professions, who may have moved or retired to the country to pursue business or lifestyle goals. Some general findings from the case studies and survey were:

- The average property size was around 60 hectares, indicating that small diversified farms are key contenders for agritourism and food tourism activities.
- The average time that businesses had been operating was 11 years.
- Most operators were over 50 years old and women were well represented as agritourism business owners and managers.
- There were also a number of Indigenous-led agritourism and food tourism businesses which were considered as highly beneficial to local Indigenous communities.
- Income from agritourism was generally ‘supplementary’ rather than fully supportive; however, 21 per cent of survey respondents reported earning over 90 per cent of their income from agritourism. Over half of the businesses surveyed reported that they returned a profit in the 2008–09 financial year.

Key drivers of and barriers to regional agritourism and food tourism

Three types of drivers were identified in this study to explain the forces influencing involvement in agritourism and food tourism. These are:

- personal and business motivations
- contextual influences and
- institutional drivers, which are generally external to, or larger than the individual business.

Personal and business motivations

Increasing or maintaining income emerged as the largest motivational influence, but there were also a range of lifestyle-related reasons for investing in agritourism and food tourism businesses. Educating people about the rural and agricultural landscape was also a strong motivation.

Contextual influences

Contextual influences are defined as wider economic, climatic and industry factors that were observed to influence uptake of agritourism. These varied across the regions and were largely related to the need to diversify income because of changes such as industry restructure or declining terms of trade. The effects of drought and other extreme weather events (e.g. cyclones) were also an influence leading some businesses to diversify into agritourism and food tourism, although these events also provided a deterrent to tourists at particular times. Other contextual barriers included economic events such as the 2009 global economic crisis.

Institutional drivers

Institutional drivers of agritourism relate to coordination, support and other assistance that enables development of agritourism and food tourism. This may involve government, industry or community-based initiatives that provide strategic direction and support to agritourism. A range of institutional influences on regional approaches to agritourism and food tourism efforts were identified. These are summarised under four key drivers that can enhance agritourism and food tourism efforts across a region:

- Clustering and linkages—where tourism businesses work together to support and promote each other. There was evidence of the creation of agricultural-based tourism experience clusters such as food and wine trails.
- Tourism networks—formal tourism networks that go beyond business clusters. These networks may be horizontal (e.g. between visitor information centres) or vertical (e.g. from

operator to visitor information centres). Integration between regional tourism networks and agritourism and food tourism efforts was important in promoting the agritourism experiences within a region.

- Marketing and market research—includes brochures, websites, festivals, experience packaging, events and a range of innovative advertising and promotional activities. Farmers markets and other opportunities for consumer–farmer interaction act as an ‘incubator’ for product development. The need for agritourism operators to have marketing skills was highlighted in all regions. Market research was key in the design of successful approaches.
- Integration and support—coordination that provides ongoing support to agritourism and food tourism at regional and local scales. Important support factors include formal regional coordination; leadership and entrepreneurship; organisational support; regional economic and community development; awareness and training; collaboration; and development of effective local food distribution systems to support food tourism.

Barriers related to institutional drivers include issues with regulations not being tailored to the agritourism and food tourism context, labour shortages and issues with signage, roads and infrastructure. There was also a perceived lack of skill among operators and concerns over public liability implications, particularly those associated with working farm experiences. Lack of understanding of, or commitment to, agritourism among industry and government institutions and lack of farmer or agricultural industry involvement in agritourism initiatives were also seen as barriers in some cases. The following table summarises key drivers of and barriers to regional agritourism and food tourism.

Personal and business motivations	Contextual influences	Institutional drivers	Barriers
Diversifying income	Declining terms of trade	Clustering and linkages	Regulatory issues
Lifestyle drivers	Labour shortages	Tourism networks	Lack of institutional understanding of agritourism
Wanting to educate about rural/farming issues	Changing land use and values	Marketing and market research	Lack of skills or perceived lack of skills
Retirement options	Drought and climate change	Integration and support—coordination at regional and local scales	Lack of farmer or agriculture industry involvement
Part or full transition from agricultural production	Industry restructure		Small business resourcing issues

Approaches required to generate successful agritourism and food tourism in a region

In Australia, there is limited evidence of long-term, strategic resourcing targeting agritourism and food tourism. A number of private sector and government (local, state and Australian Government) initiatives contribute to the resourcing of agritourism and food tourism, largely indirectly. This study found that in many regions, the agritourism and food tourism sector is at a relatively early stage in terms its institutional support arrangements. Findings from this study, drawn from literature and primary research, indicate that the following approaches are beneficial in supporting agritourism and food tourism:

- Developing a shared definition of agritourism and food tourism, and mechanisms for specific institutional support for agritourism and food tourism at a range of scales.
- Undertaking sophisticated regional market research and marketing to promote regional agritourism and food tourism experiences.
- Fostering long-term, sustainable coordination of agritourism and food tourism at both regional and local scales. Coordination should be in a form that engages farmers and tourism organisations.
- Creating training and extension opportunities to increase skills, particularly among farmers, to undertake agritourism and food tourism. Training support is needed in marketing, customer relations and product development.
- Integrating approaches to the resourcing of agritourism and food tourism efforts, particularly at start-up stage.
- Developing linkages between local produce and consumers through improved distribution systems.

Agritourism and food tourism enterprises and networks could usefully become involved in the implementation of the Australian Government's National Long-Term Tourism Strategy. The implementation of the National Long-Term Tourism Strategy (released December 2009 - see Appendix E) provides an important opportunity for the development for agritourism and food tourism as many of the issues raised in this report also apply to tourism more broadly.

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1. Introduction

Agritourism and food tourism are increasingly becoming important factors in the growth of rural and regional communities. Ollenburg (2006) claims there are two main drivers for this growth. Firstly, changes to the agricultural sector such as structural and market adjustments, have forced farmers to pursue additional sources of income, including from agritourism and food tourism ventures (Canoves et al. 2004; McGehee and Kim 2004; Sharpley and Vass 2006). Secondly, there has been an increase in city-dwellers' desire to understand more about rural life, including an increasing desire to explore the farming origins of food. Wine tourism and recreation have contributed to how we view and understand rural and regional Australia (Bureau of Rural Sciences 2008; Ollenburg 2006) and agritourism and food tourism provide an opportunity for regional visitors to enhance their understanding of food, fibre and wine production and farming lifestyles.

The combination of these two trends, which incorporate challenges within the rural sector, and changes in consumer demand, has seen a shift in the traditional focus of agriculture on production, to one that includes increased integration of agriculture and consumption. Other demographic factors contributing to the change in focus include population decline in some areas and increases in the mobility of people.

These trends are forcing some rural and regional areas to use innovative ways to diversify existing agricultural production bases. This diversification has brought significant changes to farming communities. As Ollenburg (2006) reports, many landholders who previously profited solely from agricultural production are facing issues of viability. They have had to adjust in various ways, such as expanding their farm, moving to specialised crops and livestock, selling land, machinery and stock, seeking employment off-farm or through on-farm diversification (Ollenburg 2006). Agritourism and food tourism provides an option for diversification. There are major gaps in national knowledge of agritourism and food tourism, with limited information on the extent or value of agritourism and food tourism on farms across Australia.

Aim and objectives

The purpose of this study was to provide insight into the characteristics and drivers of agritourism and food tourism and to determine key issues affecting regional agritourism and food tourism development.

This study has several objectives which are presented under the three research questions in Table 1.

Table 1: Research questions and outputs

Research question	Related objectives
What are the features and benefits of regional agritourism and food tourism?	<ul style="list-style-type: none">• Develop a framework for identifying the features and characteristics underpinning agritourism and food tourism.• Examine regional agritourism and food tourism, through the exploration of regional case studies.
What are the drivers and barriers influencing regional agritourism and food tourism?	<ul style="list-style-type: none">• Clarify the drivers and enablers of agritourism and food tourism.• Identify impediments to regional and business scale development of agritourism and food tourism.
What is required to generate successful agritourism and food tourism in a region?	<ul style="list-style-type: none">• Determine existing support mechanisms including community and government resourcing.• Review the implications of the institutional and policy environment for agritourism.• Determine potential solutions to impediments.

Definition of agritourism

Terms such as farm tourism, farm stays, farm-based tourism, rural tourism, outback tourism, agrotourism, culinary tourism and agritourism are used interchangeably throughout the research and literature on agritourism. Authors have defined agricultural tourism in a number of ways as shown in Table 2. Some have applied these terms to describe farm activities that are connected to tourism and contribute to a farm's operation. Others have used it in a broader context to describe the value and benefits to communities and regions.

Table 2: Definitions of agritourism

Author	Year	Definition
Dartington Amenity Research Trust	1974	Any tourist or recreation enterprise on a working farm.
Frater	1983	Tourism enterprises that are present on working farms and yet are largely supplementary to existing farm activities.
Murphy	1985	Working farms that supplement their primary function with some form of tourism business.
Roberts	1992	Farm tourism represents continuing ownership and active participation by the farmer in typically, small-scale tourism ventures.
Clarke	1996	Tourism products in which the consumer is aware of the farming environment.
Weaver and Fennell	1997	Rural enterprises which incorporate both a working farm environment and a commercial tourism component.
Kuehn and Hilchey	2001	Agritourism, sometimes known as agro tourism or farm tourism, is defined as any business conducted by a farmer for the enjoyment or education of the public, to promote the products of the farm and to generate additional farm income.
Centre for Profitable Agriculture	2005	An enterprise which combines elements of agriculture and tourism.
Australian Regional Tourism Research Centre	2009	Agritourism can be characterised as a business or activity that invites visitors to come on-farm or into a rural community to enjoy agriculture, its produce and the natural environment in which it exists. Agritourism is generally an additional enterprise added to the farm, integrating tourism into agri-business.

This report is based on the premise that agritourism and regional food tourism are distinct from general tourism categories. For the purpose of this project, which has a regional-scale focus, the term regional agritourism is used in conjunction with food tourism. It refers to the act of going to a region for the purpose of visiting a working farm, winery or other food or fibre related operation (including restaurants, markets, produce outlets and natural attractions) for enjoyment, education or active participation in activities and events.

The nature of agritourism regions vary depending on their resources, competitive advantages such as specialty products, scenery and local icons and their target market. Agritourism ventures include a variety of participant, educational, and spectator experiences conducted on-farm, such as outdoor recreation (fishing, bushwalking, horse riding); educational experiences (farm and winery tours, cooking classes, wine tasting, droving, special interest—students, international agricultural operators—agriculture tours or on-farm work); entertainment (food and wine festivals); hospitality

services (farm stays, country-style accommodation, restaurants sourcing local produce); on-farm direct sales (self-pick operations or roadside stands); and off-the-farm direct sales (farmers markets) (Wilson et al. 2006).

Langworthy et al. (2006) report strong and growing interest in agritourism and food tourism. Reasons for this include the following.

- The rural agricultural landscape is a significant tourism asset (Roberts and Deery 2008).
- Agritourism and food tourism have substantial economic impacts on local economies and provide one way to improve the incomes and potential economic viability of small farms and rural communities (Mason and O'Mahoney 2007).
- Agritourism usually adds value to historical, ecological or nature-based tourism (Roberts and Deery 2008).
- Farmers markets are attracting regional visitors willing to pay premium prices for fresh, good quality local produce (Mason and O'Mahoney 2007).
- Tourism often adds significant benefit to local agriculture (diversification of local opportunities, enhanced viability, increased revenues) and farm stays and bed and breakfast accommodation can provide additional income for farming businesses (Roberts and Deery 2007; Mason and O'Mahoney 2007).
- Agritourism is an excellent tool to educate the community about the value of agriculture to the economy and to quality of life (Ollenburg 2006).
- Agritourism can reduce friction on the rural–urban interface and help to preserve agricultural land (Langworthy and Hackett 2000).
- Agritourism can enhance the appeal of local products and add value to regional marketing initiatives (Mason and O'Mahoney 2007; Roberts and Deery 2008).
- Education and entertainment are increasingly seen as an important dimension of farming (in the US and Europe) (Centre for Profitable Agriculture 2005).
- Tourists are increasingly interested in the experience—for example, wanting to see how something is made, purchase food from the grower or meet the winemaker—and this trend, often driven by urban communities disconnected from agriculture, is increasingly being exploited by wineries, cheesemakers and other rural industries (Roberts and Deery 2008).

Agritourism and food tourism enterprises can allow farmers to increase farm-related income by offsetting production losses or replacing and supplementing traditional farm operations with innovative on-farm ventures. Alternative enterprises can take many forms. They can produce food and fibre or can have little to do with agriculture. They can produce new or unique crops and livestock or can add value to traditional agricultural products. They can provide for recreation, nature-based, or educational products. They can rely on traditional farm practices or use alternative methods, such as organic systems. They can be labour and resource intensive or can require few inputs. They can operate seasonally or year-round. But they all have a common theme: they help farmers stay on the farm.

Agritourism and food tourism have benefits for both the farmer and the consumer. For the consumer, agritourism and food tourism play an important role in increasing knowledge of food and wine. Through tourism and hospitality opportunities, consumers can learn about products and the background of production. While the key drawcards relate to authentic recreational and aesthetic experiences—what they see, taste, hear, smell, and feel (R Wright [Southern Cross University] 2009, pers. comm. April)—agritourism and food tourism also provide opportunities for connection with growers and rural landscapes. This is of interest to Australia's highly urbanised populations, with suggestions that they have an increasing desire to connect to the farm. This can

be exploited by farmers willing to provide these opportunities (I. Knowd [Hawkesbury Harvest] 2009, pers. comm. April).

Agritourism and food tourism customers are commonly people who are not directly involved in farming or food production but are interested in learning about them. Typical profiles may include tourists or visitors with an:

- interest in preserving farms and the rural way of life (S. Taylor, [Tourism Potential] April 2009, pers. comm.)
- interest in establishing a deeper connection with their food than what shopping at the supermarket allows (D Lyons [Australian Farm Tourism] 2009, pers. comm. April; Ollenburg 2006)
- interest in exploring rural landscapes (D Lyons [Australian Farm Tourism] 2009, pers. comm. April)
- interest in learning more about a specific farming practice, or farming in general, including other farmers (Ollenburg 2006)
- address in the same state or region of the country, since most agritourism customers travel only regionally for their experiences (I Knowd [Hawkesbury Harvest] 2009, pers. comm. April; Roberts and Deery 2008) and
- international address and interest in seeking a unique Australian experience (D Lyons [Australian Farm Tourism] 2009, pers. comm. April).

Knowledge gaps in agritourism and food tourism in Australia

In general, there has been limited information collected on the presence of agritourism and food tourism on farms. Byron et al. (2004a, 2004b, 2006) surveyed six regions throughout Australia from 1998 to 2007 and collected information on the presence of farm stays and eco-tourism on farm. Of the 5514 survey participants who responded to the question on whether they had a farm stay or ecotourism operation on their farm, 2.2 per cent reported that they did.

In comparison, Ollenburg (2006) suggested that 0.4 per cent of farmers had taken up agritourism and this represented around 0.2 per cent of the tourism industry. Ollenburg (2006) extended visitor occupancy information to estimate that the farm tourism accommodation sector would be worth approximately \$115 million in 2006. This does not include other aspects of agritourism and food tourism such as farm-gate sales.

Literature review indicates that there is currently no reliable estimate of the value of agritourism and food tourism across Australia. This is clearly an information gap that needs to be resolved to allow an improved assessment of the impact of agritourism and food tourism.

Theoretical framework

Key aspects of agritourism and food tourism identified through the desktop review were incorporated into a framework for describing regional agritourism and food tourism (Figure 1 overleaf). This was used to guide data collection and analysis and includes two key elements that can be used to describe agritourism or food tourism regions: lifestyle drawcards; and regional characteristics. Four key institutional drivers of agritourism were also identified as follows:

- Clustering and linkages—where tourism businesses work together to support and promote each other.
- Tourism networks—formal tourism networks that go beyond business clusters. These networks may be horizontal (e.g. between visitor information centres) or vertical (e.g. from operator to visitor information centres). These networks enable the flow of information, products and tourists around a region.
- Integration and support—coordination that provides ongoing support to agritourism and food tourism at regional and local scales. Important support factors include regional coordination; leadership and entrepreneurship; organisational support; regional economic and community development; awareness and training; collaboration; and development of effective local food distribution systems to support food tourism.

Marketing and market research—includes brochures, websites, festivals, experience packaging, events and a range of innovative advertising and promotional activities. Farmers markets and other opportunities for consumer — farmer interaction act as an ‘incubator’ for product development.

Appendix B contains a detailed description of the features and drivers of agritourism and the framework is shown below.

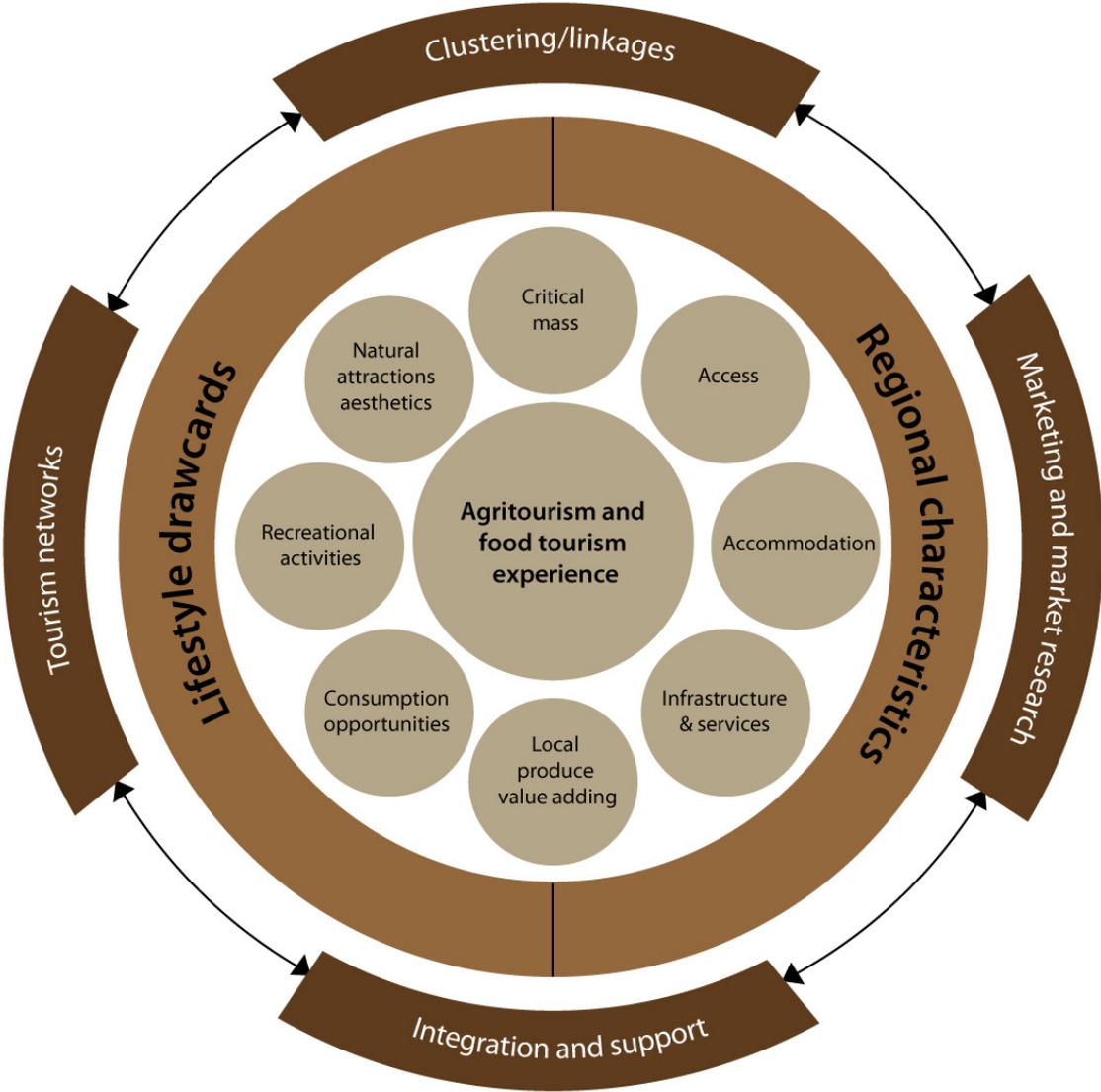
Methods

The study involved two phases, a desktop review and case study assessments. The desktop review involved assessment of a wide range of literature and other data, including Australian Bureau of Statistics (ABS) statistics, in the context of 10 regions. From the regional profiles developed in the desktop review, six regional case studies were selected for further study: Northern Rivers (New South Wales); the Tamar Valley (Tasmania); Orange (New South Wales); Tropical North (Queensland); Eastern Gippsland (Victoria); and the Harvest Highway (Western Australia).

The case study research involved conducting interviews and focus groups in each region. Interview and focus group participants held a range of different roles, from strategic tourism industry representatives to individual business operators. The term ‘support services’ is used to distinguish people who support agritourism and food tourism from the agritourism business operators in this report.

An online survey was also distributed to business operators in the case study areas. Respondents were not required to answer all questions so the sample size varies for different questions. A detailed discussion of the methods is contained in Appendix A.

Figure 1: A framework for describing key features of agritourism and food tourism



2. Characteristics of agritourism and food tourism businesses

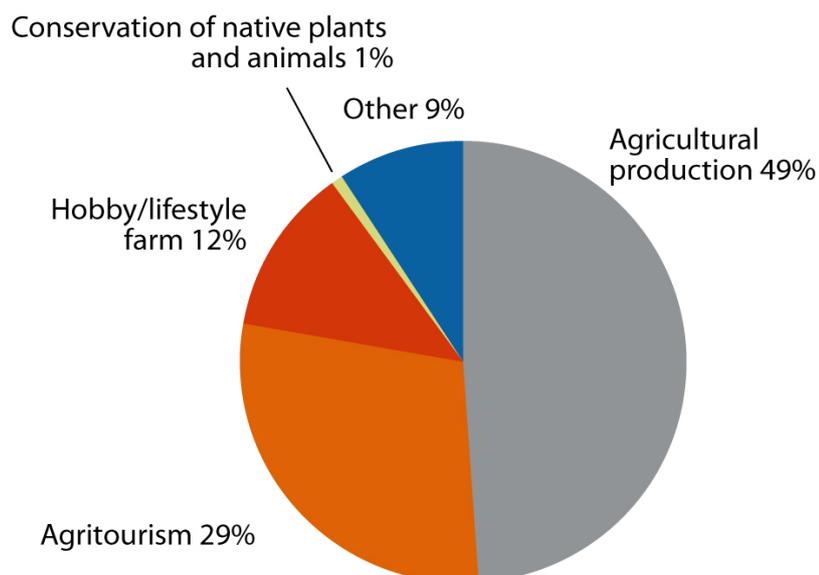
This chapter describes the characteristics of agritourism and food tourism across the six regional case studies as determined through the online survey. Sample sizes vary between questions as respondents were not required to complete all questions.

Factors typifying agritourism businesses in the case study research shared much in common with factors identified in literature on family businesses, including family farms (Getz et al. 2004). Features of many agritourism businesses included significant involvement in community activities, information sharing between operators as well as innovation and experimentation.

The degree to which businesses supplying agricultural or food-based tourism identify as agritourism businesses was explored through the online survey. In answer to the question ‘Based on the definition of agritourism provided previously, does your operation include agritourism business activities?’, 85 per cent of survey respondents said ‘yes’; 4 per cent said ‘no’; and the remaining 11 per cent said ‘don’t know’. Those that answered ‘don’t know’ identified as restaurants on farm and farm-gate sales.

Agricultural producers were well represented in the online survey. As shown in Figure 2, the majority of the respondents defined the primary purpose of their property as agricultural production (49 per cent). This was followed by agritourism (29 per cent) and hobby/lifestyle farm (12 per cent). Only 1 per cent identified their primary purpose as being for conservation of native plants and animals. For those that answered ‘other’, the primary purpose was varied, being for accommodation, restaurants, cooking schools, wineries, tour operations and retailers of local produce.

Figure 2: Primary purpose of property



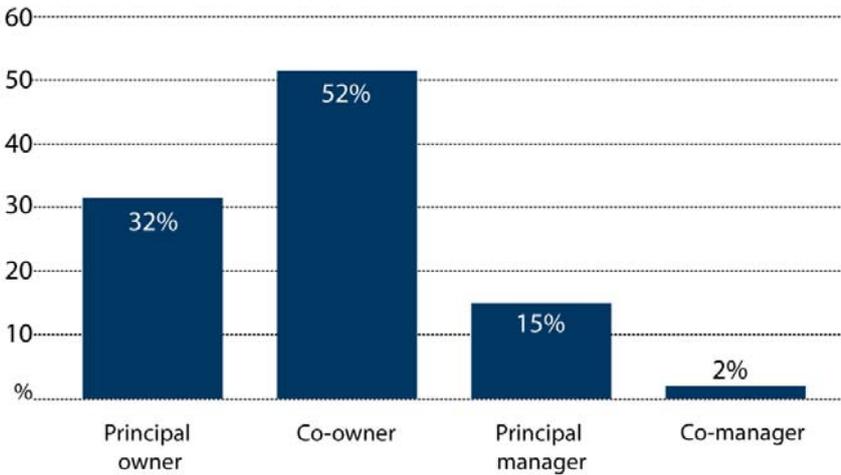
Agritourism and food tourism business operators

This section considers who is getting involved in agritourism and food tourism and draws on demographic information collected about owners or managers of the agritourism and food tourism businesses from the online survey.

The average age of agritourism and food tourism business operators was similar to the average age of farmers across Australia. The average age of agribusiness operators completing the online survey was 51 years (sample size=84). The age range was 26 to 72 years; 55 per cent of respondents were male and 45 per cent were female (sample size=87).

When asked about their role in the agritourism and food tourism business, some respondents gave multiple answers. As shown in Figure 3, almost 32 per cent of the respondents defined themselves as principal owners and a further 51.5 per cent defined themselves as co-owners, with 43 per cent of principal managers also identifying as principal owners or co-owners. There were 85 respondents to this question but 95 data points because some chose more than one option.

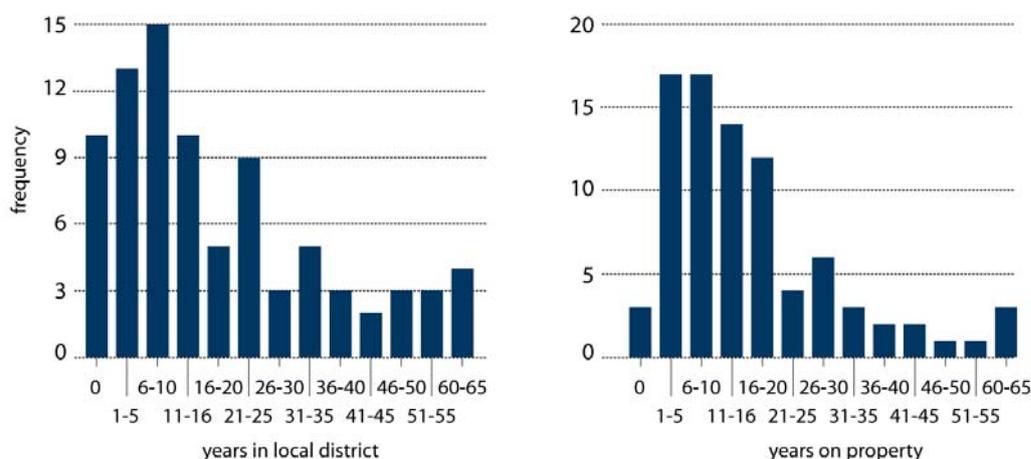
Figure 3: Role of respondent in agritourism business



According to the survey results, respondents had lived in their districts from 0 to 64 years, with a mean value of 23 years (sample size=86). Fifty per cent of these respondents had lived in the district for less than 17 years.

Length of time on current property showed a similar distribution to length of time in the district (Figure 4); the length of time ranging from 0 to 63 years, with a mean value of 16 years (sample size=85). Fifty per cent of these respondents had lived on their property for less than 12 years.

Figure 4: Length of time in district and number of years on property



Most agritourism and food tourism businesses owned the property that the business operated from, with 9 per cent leasing the land and only 1 per cent managing the land where the business operates. The remaining 90 per cent owned the land (sample size=68).

Land areas owned, leased or managed by survey respondents were generally in the smaller range, with 85 per cent having less than 120 hectares. Other than one property of 2711 hectares, all properties were under 527 hectares. With this 2711 hectare outlier removed, the mean property size was 60 hectares.

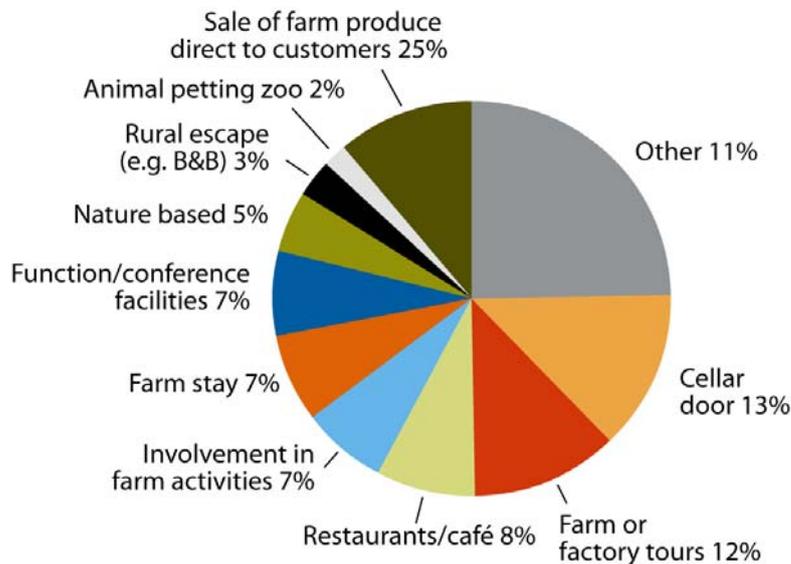
Family-operated businesses represented the majority, with 88 per cent of online survey respondents saying that they run a family operation (sample size=66). Only 9 per cent identified as corporate entities and 3 per cent identified as partnerships outside of the family.

Agritourism and food tourism businesses

This section describes the characteristics of the businesses explored through the online survey. The type of agritourism activity undertaken by respondents is shown in Figure 5 (sample size=68). Sale of farm produce direct to customers was the most frequent activity or product that agritourism businesses offered (25 per cent), followed by cellar door (13 per cent), and farm or factory tour (12 per cent). ‘Other’ activities offered included outdoor entertainment—holding concerts, school camps, fish farms, and museums. These activities are not mutually exclusive and often more than one agritourism activity was nominated.

Direct sales to customers, represented 25 per cent of respondents and includes shops on farm (from basic to sophisticated), and sales to restaurants or through farmers markets. These businesses were often increasing their contact with both local customers and tourists through a variety of contact points resulting in improved prices for their products. Cellar doors were well represented at 13 per cent and often included another function such as accommodation, restaurant or conference centre.

Figure 5: Type of agritourism and food tourism activity



Only 7 per cent of respondents described their business activity as ‘involvement in farm activities’. This aligns with the qualitative findings, with interviews and focus groups revealing that working farm experiences were relatively rare and subject to a number of perceived barriers. Public liability insurance costs and fear of litigation were the most frequently quoted barriers to farm experiences. Farm experiences ranged from staged (set up as part of the tourism venture) to fitting in with the schedule of the farm work. As one business operator said about how their clientele interact with the working farm:

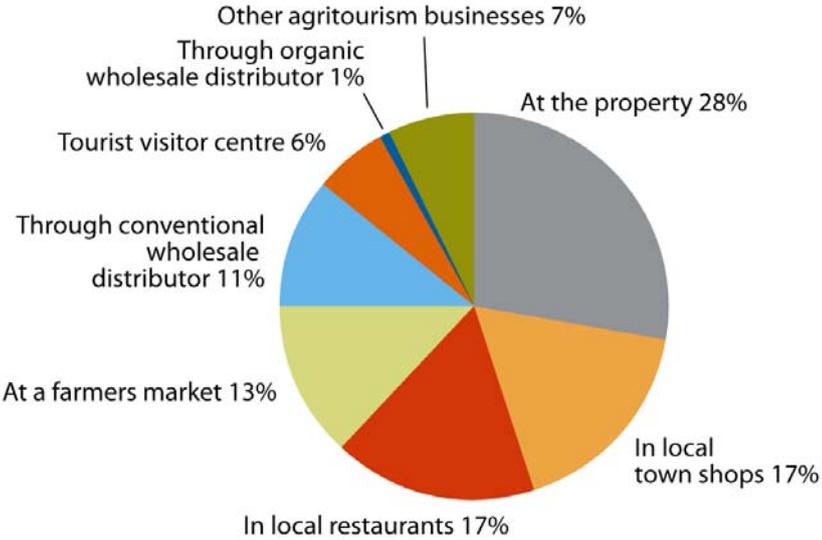
‘Most people are families and they want to see farms, they want to see stuff. If we’re shearing or crutching, or whatever’s going on, they join in. We do as we need to do because we’re a working farm that’s our main thing, this is more of a sideline and people just fit in with what we’re doing. We don’t put on a shearing show for them or anything, we just do what we’re doing.’

Agricultural technical experiences and tours were not predominant in the six regions explored in this study; however, according to several interviewees, this is an important area. One particular interviewee, who is associated with technical tours, suggests that this aspect has slowed because of the drought and also because international visitation for this purpose has been dropping over the past 10 years.

Nature-based tourism, such as bird or nature walks on farm was relatively low, at 5 per cent of survey respondents, although interview and focus group participants did highlight the potential value of this, especially in South West Western Australia and Gippsland.

Food distribution was raised as a key issue in all regions in relation to supporting food tourism. Among survey respondents, point of sale of agricultural produce (unprocessed or processed) was spread across a range of locations (Figure 6). Respondents most frequently sold produce on their own property (28 per cent), followed by 17 per cent in local town shops and 17 per cent in local restaurants (sample size=62).

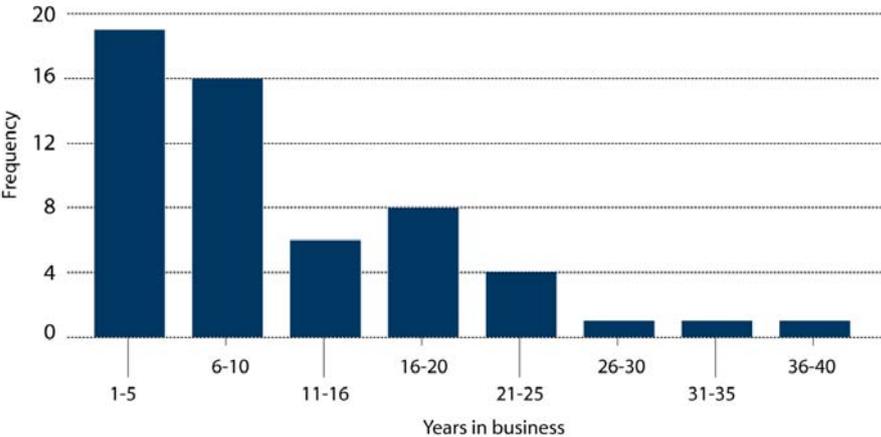
Figure 6: Method by which produce is sold



Wholesale distributors were less commonly used among these agritourism businesses, as might be expected from the general farming community. Only 12 per cent of respondents said they used wholesalers. Other places of sale included food and wine festivals, country shows, city retailers, independent grocery stores, export markets, online mail order, saleyards (for livestock), and direct delivery of produce to the home.

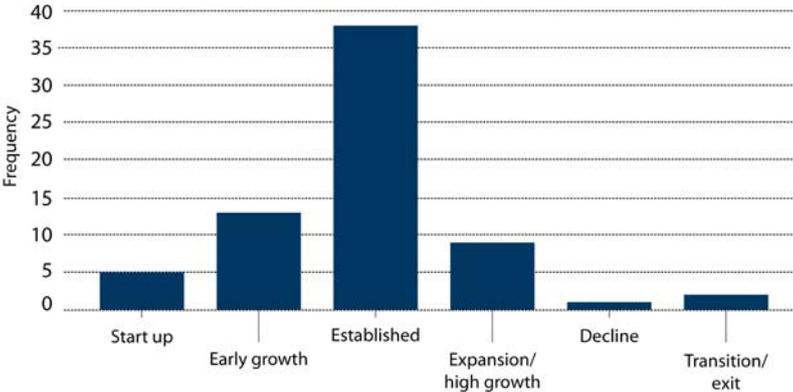
Figure 7 shows the number of years the business has operated against the number of businesses (frequency). The average time that businesses had been operating was 10.8 years, ranging from 0 to 40 years. Fifty per cent of respondents (sample size=57) had been operating their business for less than eight years. Three respondents had operated their business for 30 to 40 years.

Figure 7: Number of years the agritourism and food tourism business has been operating



As shown in Figure 8, the majority of respondents to the question about the stage of development of their business stated that they were in the early growth, established or expansion/high growth stages (sample size=68). Seven per cent stated that they were in the start-up stage.

Figure 8: Stage of development of agritourism and food tourism businesses



Agritourism and food tourism businesses were dependent on staff from within and outside the family and, with some exceptions, would generally be classified as small businesses. Generally, family staffing was reported to be the preference but the larger businesses clearly needed to source outside labour.

Less than half of the respondents completed the question on paid labour outside of the family (sample size= 46). Based on these respondents, businesses averaged 9.6 paid non-family employees. Paid non-family labour ranged from 0 to 100 people, with 87 per cent of the businesses having less than 20 non-family staff.

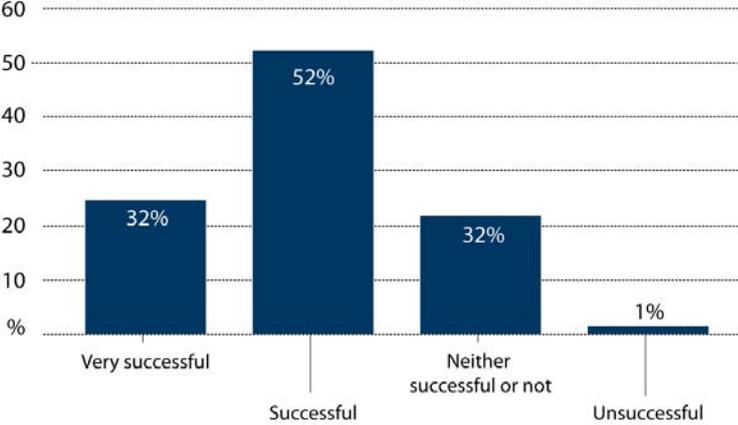
In comparison, the average number of paid family employees working within the businesses was 2.2, with a range of 0 to five people (sample size=41).

Some respondents identified that they were using voluntary labour in their agritourism and food tourism businesses. Thirty-six respondents answered the question on voluntary family labour working in their businesses, with an average of 3.1 family volunteers per business. The majority of these respondents (89 per cent) said they had less than five voluntary family members employed.

It is worth noting that because of the low response to the questions on employment, this information is limited.

Most online survey respondents considered their agritourism and food tourism business to be successful. Sixty-nine respondents answered the question asking them to rate the success of their agribusiness to date. Of these respondents, 77 per cent answered that they rated it either very successful or successful, with only 1 per cent rating their agribusiness as unsuccessful (Figure 9).

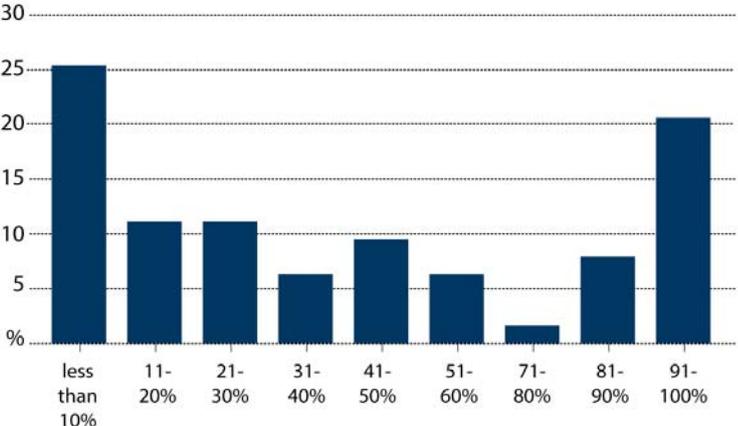
Figure 9: Perception of success of agritourism business



The definition of success of regional agritourism and food tourism initiatives is a subjective measure. It could be defined as long-term sustainability of the business or businesses involved or it could be defined as when the enterprise has achieved all it can to meet the objectives determined for that business (business operator). Appendix E lists free text responses to the online survey question about definitions of success.

Over half of respondents (56 per cent) said that their agritourism business returned a profit in the 2008–2009 financial year (sample size=68). The remaining 44 per cent said they did not return a profit in 2008–2009. Related to this, 40 per cent responded that income from agritourism was enough to keep the business viable (sample size=68). Only 6 per cent of respondents said that it was more than enough to keep the agritourism business viable. A further 28 per cent said it was either not quite enough or definitely not enough to keep viable. There was a wide spread of responses in answer to the question about the proportion of total income that came from their agritourism and food businesses. Twenty-five per cent of respondents said that less than 10 per cent of their total income comes from their agritourism business, whereas 21 per cent said that 91 to 100 per cent of their total income comes from their agritourism business. The remaining 64 per cent are fairly evenly distributed across the mid-ranges of percentage of income (Figure 10).

Figure 10: Proportion of income earned through the agritourism business



3. Benefits and drivers of, and barriers to agritourism and food tourism

This section first explores the benefits of agritourism and food tourism communicated by study participants. These help explain motivations and drivers influencing involvement in these sectors, not just by business operators but by a range of government and community based stakeholders. This is followed by discussion of barriers and institutional drivers.

Benefits of agritourism and food tourism

Agritourism and food tourism can provide food, fibre and wine producers with a means for business diversification and income support during transition to new approaches and opportunities to create new avenues for revenue for themselves and their local communities. For producers, agritourism and food tourism have a role in introducing farmers to potential new markets and products, through better interaction with consumers and other members of the value chain (I. Knowd [Hawkesbury Harvest] 2009, pers. comm. April).

In addition to serving as an income source, agritourism and food tourism can benefit farmers by:

- helping create name recognition for their agricultural products
- helping educate consumers about farming and the rural heritage of the region
- generating increased motivation for the protection of natural resources and natural amenities, as these features are valued by visitors
- generating ‘spillover’ economic development opportunities in rural communities by bringing tourists into town (who may then shop, eat and lodge locally).

The main benefits of agritourism and food tourism communicated by participants in this study focused on the value to the wider community and on employment benefits. Enhancing the sustainability of local farmers and helping reverse rural decline were also identified as benefits.

There were numerous observations of triple bottom line benefits to the community from agritourism and food tourism. From the Orange workshop:

‘You should look at the community...there’s benefits at the social and cultural level from all this. We don’t live by dollars alone.’

Downstream benefits from agritourism businesses are summarised by a business operator interviewee:

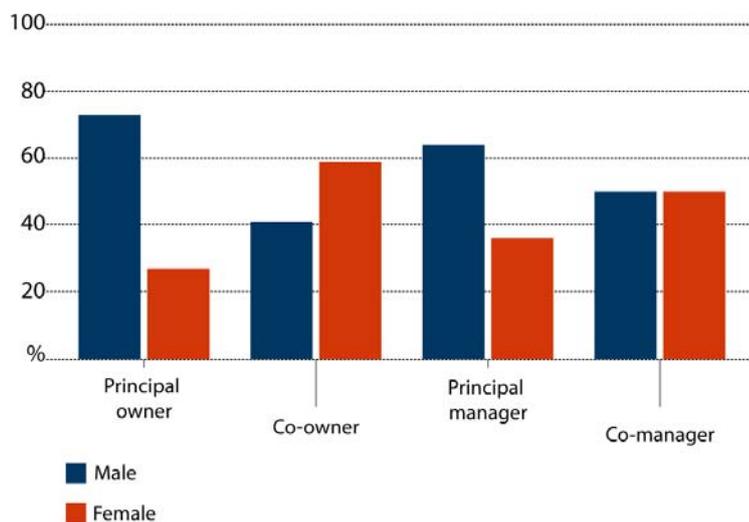
‘This food and wine trail creates so many jobs for so many other people. Like not just our businesses, but outside people, people stay a day longer, they wreck the lights, the kids put a hole in the wall you need a plasterer, they buy a newspaper. They shop, they eat, they drink, it goes right through [to the community]’.

Further benefits observed in the study were leadership opportunities for women, the involvement of young people, and opportunities for Indigenous employment and business development. These aspects are expanded on the following pages.

Involvement of women

Women were significantly engaged in agritourism and food tourism businesses. Although the survey responses showed that women were only 36 per cent of principal owners and 46 per cent of principal managers where there was one primary owner or manager, these figures are be slightly higher than some figures on female leadership in agricultural businesses. For example, ABS (2008d) report that the number of female farmers that were the reference person or spouse/partner in a farming family, accounted for around one-third of all farmers in farming families in 2006. Where a shared model of ownership or management existed, the online survey showed that women represented half of or more of this, with 59 per cent of co-owners and 50 per cent of co-managers being female (Figure 11).

Figure 11: Business ownership and management by gender



Agritourism and food tourism provide a range of opportunities for women, including leadership (business and community), employment in the family business, working from home and networking opportunities. Many respondents commented that women play a significant role in leading agritourism initiatives.

A not uncommon situation was the female partner working in the farm-gate shop, restaurant or function centre while the male partner continued to work on the farm. There was indication that some farmers were not always putting effort into the most profitable part of the operation. One business operator says of their transition from farming to agritourism:

'The tourism side of the business makes us viable.... (XXX) is still down with the orchard, hasn't made anything out of them for years.'

Tourism-based business activities provide opportunities for women who want to participate in the agricultural enterprise but may have been constrained before. As mentioned in one interview:

'My daughters are both very interested in the farming and hopefully the tourism will help give them a job as well and we will be able to employ more people.'

Retaining and attracting youth

A number of participants described how agritourism and food tourism were encouraging the participation of young people in the rural community and in agriculture, because it provided meaningful and interesting employment. There were several examples where agritourism and food tourism businesses were being handed over to the next generation. One agritourism business operator for whom this was the case had the following comment:

'It's very difficult for the young people to find work. We're losing too many of them. We employ young people at home, outreach people and for work on the farm and what-have-you, it does provide employment for people in the area. There simply isn't employment for people that are there by choice. We provide something that they are there by choice, not because they're just handed down and passing it on to their kids, because it's a job that they really want to do.'

A participant in a focus group identified agritourism as a way to attract farming youth back to the community:

'There's a good entrepreneurial culture here. So for young people to actually come down and to start a business, there are opportunities.'

Opportunities for Indigenous communities

A common thread communicated by Indigenous-run food and cultural tourism business operators was that these enterprises often involve and contribute to the wider Indigenous community. This was a clear objective of these businesses. A business operator who is involved with an Aboriginal Cultural Centre which includes a café open to the public, accommodation and tours said that the centre was important for teaching children and providing a central place where people can experience and enjoy aspects of their culture:

'[the centre] has been important in keeping the local culture alive and teaching others about the local community. The centre is for everybody and even kids enjoy what the centre provides.'

Motivational and contextual influences

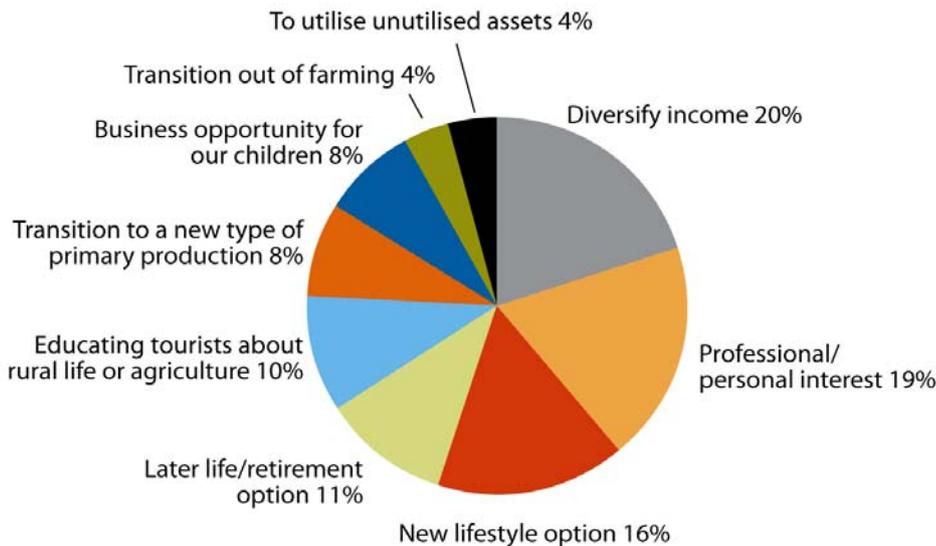
Motivational influences

The motivational influences communicated by interviewees are examined in each of the case study sections. A number of distinct motivations emerged, including those associated with farmers in transition, incoming lifestylers, those seeking retirement options and, to a lesser extent, corporate entities. The desire to increase or maintain income was the most frequently referenced response to this enquiry, followed by those citing lifestyle drivers and those wanting to educate people about farming or rural issues. Other motivations included wanting to work from home to support young children and for other reasons.

The online survey also asked respondents what were the main reasons for establishing agritourism and food tourism businesses. Respondents could choose more than one reason. Sixty-seven respondents provided 168 responses to this question, with many of the respondents providing more than one reason. Twenty-three per cent of respondents chose three or more reasons for establishing their agritourism business.

In keeping with the findings from interviews, the majority of respondents (20 per cent) indicated that income diversification was their main reason for being involved in agritourism and food tourism (Figure 12). In addition, 19 per cent indicated that the main reason for involvement was related to professional/personal interest and 16 per cent indicated that it was about new lifestyle options. Ten per cent said that the main reason was educating tourists. Only four per cent indicated their reason was to transition out of farming entirely. This could indicate that respondents were not transitioning out of farming completely as much as they were diversifying, and retaining some farming function. A relatively high level of partial transition from farming was found in the qualitative component of the study, as discussed elsewhere.

Figure 12: Main reasons for establishing the agritourism business



The key motivating factors determined through this study are explored further below.

Increasing or diversifying income

As discussed earlier, the online survey determined that 56 per cent of respondents said they returned a profit from their agritourism and food tourism in the 2008–09 financial year, demonstrating that increasing income can be both a motivation for and an outcome of agritourism and food tourism.

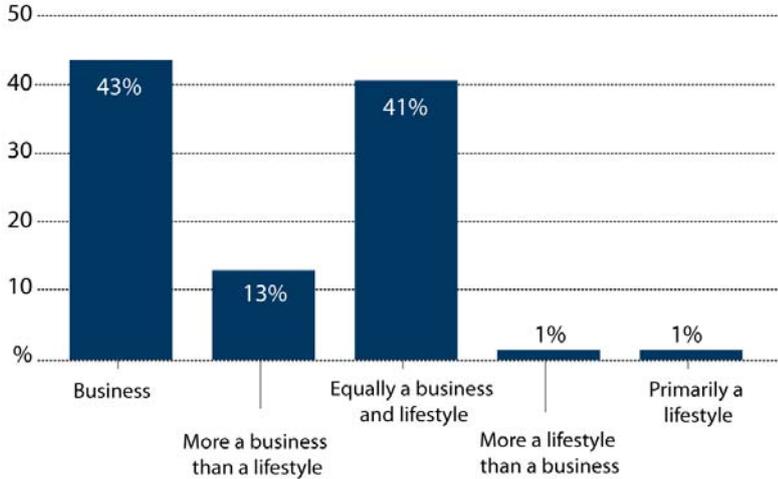
As would be expected, there is a diversity of business income models and motivations. Generally the approaches of agritourism businesses can be classified into two groups: those carrying out largely opportunistic agritourism, which often involved using existing assets, word of mouth or other informal marketing and not making major capital expenditure; and those who were deliberately making major investments into infrastructure and marketing to develop and promote their business.

Many farmers mentioned the benefits of their tourism income providing cash flow between income from farming and also when horticulture and livestock prices give a poor or neutral return.

Lifestyle

Tree or sea changers were well represented among the business operators interviewed. Those motivated by lifestyle drivers may have also been in the district for some time. Figure 13 provides information from online survey respondents on the question about whether their agribusiness is more of a business or more of a lifestyle (sample size=69). While business motivations prevailed, with 43 per cent stating it was more a business, the lifestyle motivation was clearly important, with 41 per cent stating it was equally a business and a lifestyle. Only 2 per cent answered that it was either more of a lifestyle than a business or was primarily a lifestyle.

Figure 13: Business and lifestyle motivations for the agritourism business



A few respondents added comments to their answer. One couple said they 'are retired people and this is a retirement/lifestyle activity'; another said they characterised their pattern as 'working hard five days a week in business, with weekend plantation work and tour hosting part of the lifestyle'; a third respondent stated that 'the capital involved in establishing the operation has necessitated a greater emphasis on business outcomes than lifestyle at this stage'.

There were several farmers who were motivated by an improvement in lifestyle. One business operator explained the benefit in transitioning from distributing fruit to market, to be based on-farm, where they can sell 100 per cent of their produce for double the wholesale price:

'I'd drive the truck to Melbourne. So we'd work all day in the orchard, then I'd drive the truck, pack the fruit, drive the truck to Melbourne, then (husband) would go into the market and I'd sleep on the floor at his mum's place. He'd come out and I'd drive the truck home and he'd fall asleep ...and we did that for several years, then that got a bit much ... then we decided about eight years ago that it'd be better to use our energy working and farming here and selling here.'

Educating about rural issues

Sharing the rural lifestyle and education on farming and rural issues was a strong motivator for many involved in agritourism and food tourism. Some farmers spoke of the benefits of being able to chat to the consumer about their agricultural product, not just from a marketing perspective, but because they love what they do and want to share it. In interviews, many operators commented that their desire to educate about rural issues and agriculture was met through their interaction with visitors.

Many operators commented that people want contact with rural life; that some city-dwellers have a need to link back to farming; that the public is looking to educate kids on where food comes from; and that some people genuinely like to experience farm animals and countryside.

One business operator runs a holistic farming operation and is keen to share the knowledge of this with visitors at their farmstay:

'They love the education side of it ...we're trying to tell them farmers are good, we're not these people that are producing carbon emissions all the time, we're trying to work against it, we're trying to get the carbon back in the ground using our grasses and we've had a tree planting project up our creek a few years ago, and there's lots of things.'

Rather than closing during the drought like some other businesses, this operator stayed open:

'(Another farmstay) closed up in the drought. They said people don't want to come. Well we didn't close up and we never stopped. People still kept coming at the usual rate, and they were interested to see how we coped, and what we did, and you put in long hours watering your stock and keeping them alive.'

However, the degree to which consumers want to be or are willing to pay for being educated is questionable. One participant runs a 'pick-your-own' operation. They observed the 'wanting to learn' consumer segment but said that it is a very small segment, generally an older age bracket and most do not want to spend money. This market segment is encouraged by tour operators but may not always be beneficial for the farm operator. One business operator commented:

'We have a few coaches that come to buy [product] from the farm and then have food tours—people who want to know how food is grown. The latter has not been very successful. A few people have come for this—mostly older people who are just having a day out. It's interesting [to them] because they don't know about food production. For some reason these tour operators seem to think the farmer does it for nothing. I have refused to accommodate them unless they pay.'

This observation fits with the 'wanderer' market segment identified by the tourism industry, which is identified as a small part of the market (S Sykes [Orange Council] 2009, pers. comm., September).

Farmers in transition

Businesses that get involved in agritourism or food tourism may be new businesses that are set up with an agritourism focus from the start. Alternatively, they may be existing agricultural businesses that add value through the addition of an agritourism or food tourism component, while maintaining the primary source of income. Similarly, agritourism and food tourism may be part of a strategy in the transition between businesses. Those in transition may have a 'boot in both camps' (A Chapple [Harvest Highway] 2009, pers. comm., May), with interests divided between agricultural production and tourism.

Farmer transitions into agritourism included:

- growers with new small farms learning how to grow for farmers markets
- those diversifying and learning what the market wants, with improved product or product distribution as a main factor
- established growers wanting to expand (e.g. adding chalets to a vineyard)
- those planning a retirement strategy
- those who want to stop farming but remain on the farm.

Business operators in several of the case studies were using their agritourism enterprise to ease into retirement. It is important to note that those seeking a retirement option weren't always retiring from farming. In the case of one business, the couple were planning to expand their business in order to reduce workload as they grew older:

'Wanted to set up the tourism part to be able to pay to employ another person, husband is a bit older than me and wanting to slow down a bit, so it would have reduced manual labour.'

Contextual influences

Terms of trade

As described in the regional case studies (Appendix C), decline in terms of trade in some industries has provided an important contextual influence. The following comment from a participant in Gippsland, describes the sentiment conveyed by a number of farmers who have transitioned into agritourism and food tourism:

'In fact, there are farmers who are on negative incomes and they've got to be looking for something else. Success for some of those guys is not about, "will I grow next year"; it's "will I still be here?" That, I think, is an important aspect too in that some farmers have survived by growing bigger; others haven't been able to grow bigger because they just can't afford it, and they've got to be looking at other sources of income.'

Labour shortages

Shortage of appropriately skilled and motivated labour in some regions is another important contextual issue for agritourism, as it is for agriculture more generally. This includes labour shortages but also the shortage of desirable rural jobs. The National Long-Term Tourism Strategy (DRET 2009) recognises labour and skills issues as a key challenge for the tourism industry and one of the nine working groups established under the Strategy is the Labour and Skills Working Group. This Working Group is to develop a dedicated outlook for the tourism industry's labour and skills requirements over the next five years, identifying measures to fill projected gaps.

In South West Western Australia, one of the business operators commented that labour shortages in the fruit picking industry are one motivating driver for switching focus to the tourism side of the business. Tourism requires less paid labour and has the potential to offer jobs that people are more prepared to do.

'So basically all these manual tasks, which is what the fruit industry is all about, is just getting harder and harder and harder...and that's why we went for this [tourism] business as well.'

Business operators also emphasised the need for alternative labour sources other than backpacker or local labour sources, such as through overseas labour schemes.

In other cases, such as Northern Rivers, New South Wales, attracting labour in late 2009 to support the agritourism business was not a problem. However in the less populated regions people were finding it difficult to attract and retain labour, even outside of agriculture. In many cases people complained about the lack of adequately skilled labour.

Some people were motivated to do the work themselves and were not keen to employ people for a range of reasons. There were many cases of women business owners, who claimed no catering experience, stepping up to the plate for massive catering undertakings, such as one business owner who was sole caterer for the 50 weddings held annually at their vineyard/restaurant/accommodation facility, as well as breakfasts for all guests. One business operator communicated a common theme, that businesses stayed small to avoid employing staff:

'Yeah. We really don't want to employ people. We don't want to expand, because we don't want extra people. I wouldn't like it.'

With the smaller businesses, family labour is often the labour of choice. External labour is brought in only when needed and often on a casual basis.

Changing land use and land values

As discussed in the regional case studies (Appendix C), changes in land value and uses influence the uptake of agritourism, particularly in more populated regions, where there is greater demand for land for rural-residential development. Increasing land values provide pressure to increase income to justify the levels of capital held in the property. This was demonstrated in one business located on high-value land in the Northern Rivers NSW region, where the tourism venture helped the farm pay for itself.

Drought and climate shocks

Drought and climate were not clearly identified as direct drivers of agritourism, but a context in which businesses had to operate. Participants from Gippsland particularly noted the effect of heat on crops, including crops losses and the need to develop alternative watering or shading systems. Also in Gippsland, business operators observed that the fire danger warnings during the 2009–10 summer kept tourists away, including at times where there was limited risk. Cyclones in the Tropical North were also viewed as having an important impact on the agritourism and food tourism industry, in terms of damage to infrastructure, crops and stock and by deterring tourists.

Barriers

Barriers to agritourism and food tourism determined through interviews and focus groups in each region are discussed in detail in the case study descriptions (Appendix C). While views on barriers varied across the regions, many issues remained consistent.

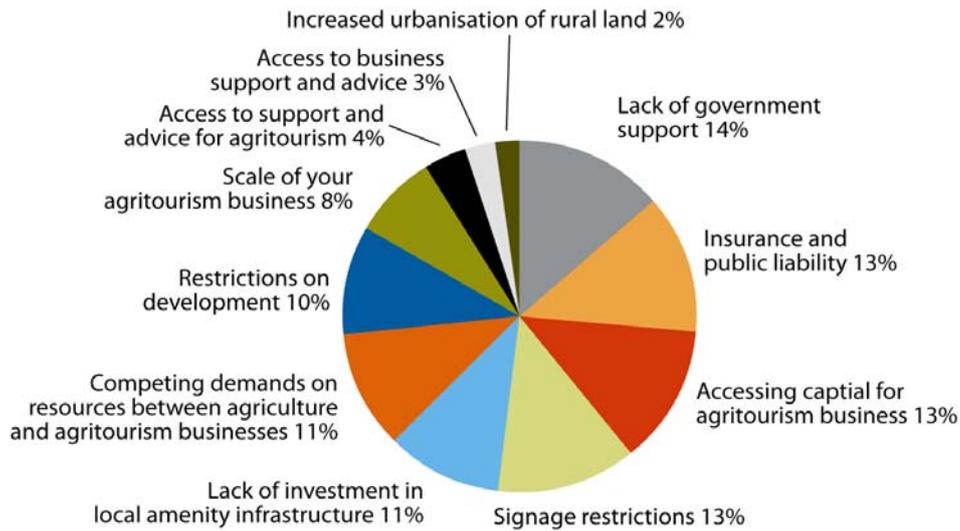
Key issues identified as barriers, with those most frequently referenced at the top, were:

- regulations (including building, food safety and OH&S regulations)
- lack of involvement of farmers and the agricultural industry in leadership roles in agritourism initiatives
- labour shortage or skill shortage issues
- small business resourcing issues
- signage issues
- roads and infrastructure
- public liability (and insurance requirements)
- lack of institutional understanding of, or commitment to, agritourism.

The online survey asked respondents to rate barriers that were grouped into 11 categories which were drawn from the literature and qualitative component of the study. There was no outstanding barrier noted, with respondents indicating a variety of issues of similar priority that impacted on their ability to undertake agritourism and food tourism. A summary of the 240 responses about barriers affecting agritourism businesses is shown in Figure 14 (sample size=64). Selected barriers that were of similar priority included lack of government support (14 per cent); insurance and public liability (13 per cent); accessing capital (13 per cent); and signage restrictions (13 per cent).

Restrictions on development (10 per cent), as well as signage, are reflective of the comments from respondents that local government regulations were not always adapted to or suited to development of tourism initiatives on-farm. Increased urbanisation of rural land was not considered to be a significant barrier by most respondents. This is potentially because many of the regions considered in this study were not dealing with conflict between rural residential and agricultural uses, with the exception of Northern Rivers.

Figure 14: Perceived barriers affecting agritourism



Note: The effect of rounding of numbers up and down has resulted in the total adding up to 102%.

Other barriers raised by online survey respondents are listed below.

- the global financial crisis
- fluctuation in the wine industry and tourism industries
- swine flu
- bushfires
- level of discretionary spending available to consumers
- inadequate support from the state/mainstream tourism industry
- lack of supportive infrastructure such as an airport
- competition from other tourist attractions
- low awareness of the business in the region
- personal ill health.

Some of the key barriers are discussed further below.

Regulatory barriers

Issues around regulation focused largely on building approvals, including issues relating to building codes, such as disabled access and requirement to upgrade roads for tourism operations. Further challenges that small businesses need to address are food safety requirements, signage restrictions, liquor licensing restrictions and agricultural land protection legislation.

Participants in the Northern Rivers NSW region noted that many of the building approval related regulations they had to observe were more suited to urban circumstances and didn't necessarily fit with the country environment. A number of participants suggested the need for a common sense approach to the rural environment.

The conservative attitudes of local councils were also cited as a barrier in some regions. Neighbour approvals were cited frequently as the reason why approval for an agritourism venture was not granted. Often this related to increased traffic on shared country roads.

Demonstrating the complexity of developing legislative controls that can satisfy all, tensions arose from both extremes of agricultural protection legislation in the agritourism sector. Issues were raised on the lack of protection of agricultural land from development, thereby depleting food production and rural amenity. This then affects the overall agritourism and food tourism experience. On the other hand, issues were raised about the restrictions that agricultural land protection legislation put on agritourism development. One participant, who worked in tourism support services, observed that restrictions on development may limit the ability of farms on high-priority agricultural land to diversify into tourism:

'Priority agricultural land zoning is an issue—it is done to protect agriculture, but presents a hurdle for tourism.'

Another concern with regulations is that they can lead the operator towards developing a product that is not consistent with the demands or preferences of customers. An example raised was the requirement to chlorinate rainwater to supply accommodation drinking water supply.

Issues with health and food safety and licensing of premises were raised by a number of operators. One business operator commented that the licensing conditions of their cellar door prevented them from selling products not grown on the property. After a series of drought years, where no produce from the farm was available, this could mean the difference between the business continuing or not. This business operator had the following comment.

'Licensing (such as that for a roadside stall) is such that if we have a complete drought—we are licensed to sell (only) what is grown on our property or make on this place. In a drought year we have no income and no business.'

It is worth noting that in other cases, the requirement to sell only what is produced on the property was applauded by other participants as this ensures authenticity. It is clear that this issue may need to be resolved on a region-by-region basis.

Resourcing issues

Access to capital was cited as a barrier to starting or expanding agritourism operations by a number of operators (13 per cent of survey respondents). Resource related issues raised by business operators included high interest rates, transportation costs, marketing costs and high start-up costs. Options for addressing this included selling land to enable investment in the operation, although in some cases subdivision restrictions meant that it was impossible to raise funds to start the venture.

Staying open seven days a week and being constantly available for customers and tourists was often cited as a cause of stress for operators, and a barrier for support staff. For example, one tour operator commented:

'I'll drive say 10 or a dozen people to a winery and I'll build the winery up in the half hour, three quarters of an hour travel, and you get there and there's a sign hanging off their main sign, 'sorry, closed today'. I mean what do you tell people? It is crazy. Now all the positives of the region are just blown apart.'

Exiting or on-selling the agritourism business was not always straightforward. Issues with this were not dissimilar to issues with on-selling rural agricultural properties. One participant had been trying to exit because of health reasons. While the participant said that the vineyard and cellar door business was profitable, it had been on the market for three years, with prospective buyers having

difficulty getting finance. With all their assets tied up in this business, the inability to move on was leading to depression.

Owners of a farmstay/cafe, which had declined in profitability in the past few years also said they were having difficulties selling the property, causing some distress. Ability to exit is an important issue, particularly for ageing business operators.

A number of participants proposed improvements to industry support mechanisms. Many of the interviewees had established tourism businesses and had already overcome resourcing limitations. Another issue with recognising agritourism and food tourism as a rural sector industry was observed in regard to funding guidelines. While agritourism businesses on farm may have similar needs to primary production businesses, some felt that they were likely to be treated differently with regard to support programs. As one focus group participant noted:

'We're not counted as agriculture, so when there's a flood and all the farmers can get assistance to get their fences fixed, we don't fit in that..'

Lack of institutional understanding of and commitment to agritourism

Lack of understanding about the agritourism and food tourism sector, particularly the lack of understanding among regulators, funders and administrators was mentioned often as a barrier. Agritourism businesses often found that requests, such as building approvals, were not able to be interpreted appropriately because of a lack of understanding about the particular needs of these kinds of businesses. Some participants suggested that agritourism did not have the same right-of-use standing as farming and thought that this should be remedied.

Approval for agritourism and food tourism activities may be very different to the requirements for agriculture, even if their impact is not so different. For example, one business operator noted that a horticultural plantation which may have 20–30 workers a day may not be required to upgrade a road even though a farm tourism business that is attracting 20–30 tourists a day may have to.

A focus group participant discussed how agritourism is considered different to agricultural production pursuits in terms of right-of-use and recommended a change in this:

'Agricultural production isn't restricted use on rural land. So you can do whatever you like with your farming. It's not until you go to build a shed or you go to improve your infrastructure that you really need to [get approvals] and if it's associated with agricultural production, it's not an issue. So I guess my key solution is recognition of agritourism as part of the agricultural sector. So it's not [seen as] a change of use, but as a right of use. Agritourism isn't a change in use. Because the moment you do change of use, it changes everything. So it's really about recognising agritourism as a right of use in agricultural zonings and nature based tourism as a right of use in association with conservation zonings.'

Skills and perceptions of skills

Agritourism and food tourism operator skills were a strong theme in several case studies. There were a number of concerns expressed that some agritourism and food tourism operators were unable or unwilling to provide consistent experiences to all guests, and were failing to attract return visits as a result. Noted in most case studies was the danger of some operators 'diluting' the

regional tourism product through providing a poor service. One focus group participant commented that people need to really want to do tourism and those that don't can affect the reputation of the entire region:

'...they actually dilute the product... you work very hard to get a consistent cup of coffee in the middle of winter. You might end up in a shop somewhere on a Sunday or at 2 o'clock on a Saturday trying to find something that's open. So that has to change and that means that people have to get more professional about it which is what needs to be done, rather than having a lifestyle option or whatever it may be.'

At another focus group there was criticism of some operators' marketing abilities:

'But a lot of people haven't worked out they have to go to a bit of trouble if they want to differentiate from these wholesalers—can't just chuck carrots in a bucket.'

Training or study tours for operators were mentioned as a possible solution and these opportunities are discussed in detail in the next section of this report.

Marketing

Marketing and communication efforts were regarded as important to portray a positive regional image. In some cases, efforts were seen to be inadequately targeted and some regional marketing efforts were seen to demand resources beyond the capacity of small businesses.

The case study regions selected were all well-known tourist destinations; however, in a number of these regions, participants expressed that tourism promotions were targeted to more well-known destinations at the expense of some emerging destinations. A number of focus group participants suggested that marketing needed to be used to spread the influence rather than focusing on existing tourism areas.

A key marketing strategy was food festivals and special events, generally promoting local produce and experiences. Such festivals and events received some criticism, because while the promotional value was recognised they were seen as largely unsustainable and subsidy dependent. Small businesses also found it difficult to provide staff to attend these festivals. In some cases festivals may run over a few years and then stop due to lack of resources or volunteer exhaustion. In contrast, the other festivals were seen as a major factor in promoting the region and represented highly organised and well-supported events.

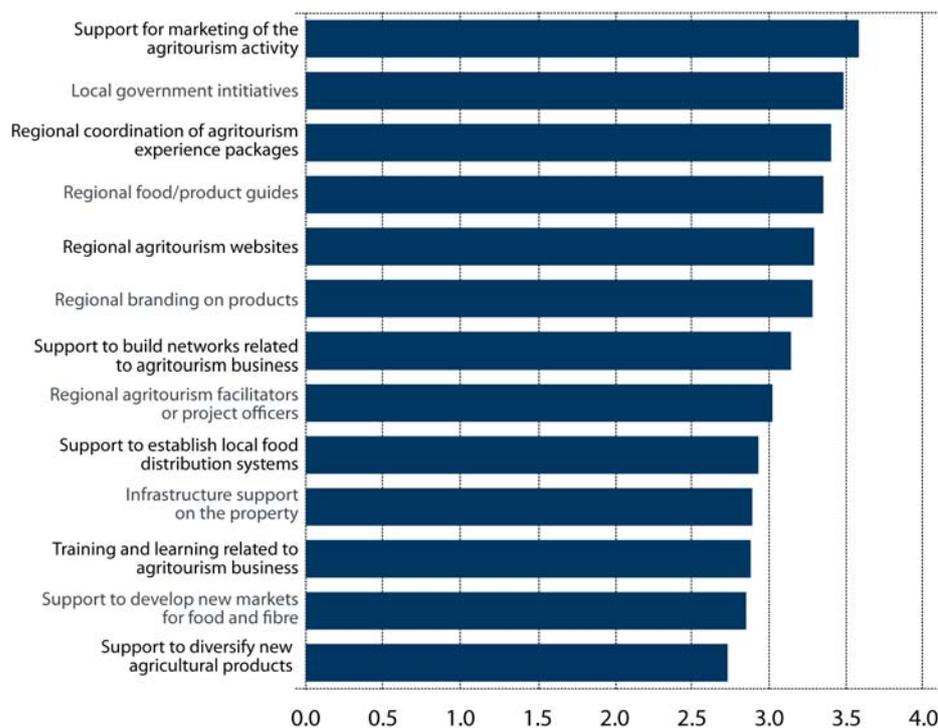
Institutional drivers and enablers

This section considers institutional and other enablers of agritourism. These relate to coordination, support and other assistance that enables development of agritourism and food tourism. This may involve government, industry or community-based initiatives that provide strategic direction and support to agritourism beyond the individual business scale. A variety of drivers and enablers were identified by participants in interviews and focus groups, including:

- marketing and market research
- farmers markets
- informal cooperation
- chefs and restaurants
- short supply chains
- communication with consumers
- leaders, champions and innovators
- food and wine trails
- formal regional coordination.

The online survey collected information on what types of support people had already accessed, with respondents able to select as many types as they wished within the options offered. The most common type of support accessed was local networks. As well, training and learning related to agritourism business, the use of regional/food product guides, support for marketing of the agritourism activity, local government initiatives, and regional branding of products were shown to be often used by participants. The online survey also collected information on the importance of particular agritourism business supports (sample size=69). The results are shown in Figure 15 with the scale of importance shown on the y-axis.

Figure 15: Perceived importance of supports to agritourism businesses



A scale of 1 to 4 represented assessments of importance: 1–Not important; 2–Only slightly important; 3–Important; 4–Very important. All of the support types have a degree of importance, ranging from 2.7 to 3.6—which gives a spread of data on either side of the ‘important’ value of 3. All categories to the left of and including ‘regional agritourism facilitators or project officers’ had an average value of 3 or above (with a maximum value of 3.6)—indicating that they are, on average, considered to be ‘Important’ types of support for agritourism.

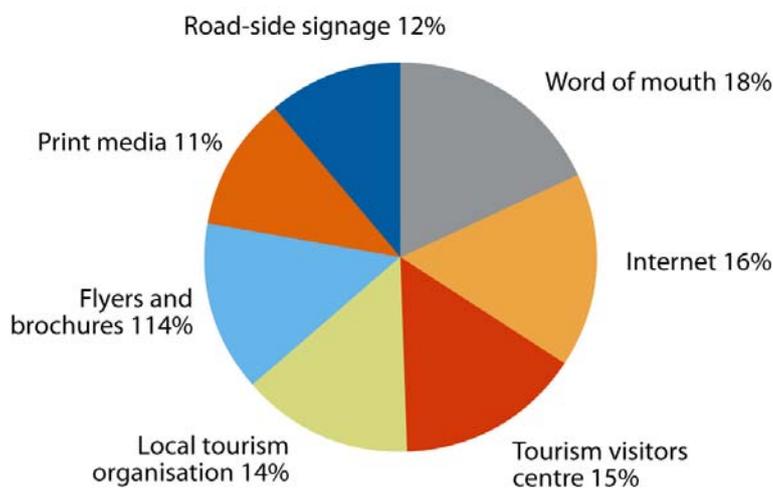
The two most important support categories are: ‘support for marketing of agritourism activities’ and ‘local government initiatives’. All the other support categories had an average value between 2.7 and 3, indicating that they are at the upper end of ‘only slightly important’.

These institutional drivers and enablers can be summarised under four key drivers of agritourism and food tourism: marketing and market research; tourism networks; clustering and linkages; and integration and support. They are discussed further on the following pages.

Marketing and market research

Respondents to the online survey (sample size=69) provided 366 responses to the question about the marketing mechanisms that they use to market their agritourism business (Figure 16). The spread of responses was fairly even across the seven defined categories with ‘word of mouth’ having the highest percentage (18 per cent) and ‘print media’ and ‘roadside signage’ having the lowest percentages (each with 11 per cent).

Figure 16: Marketing methods used by agritourism businesses



NOTE: The effect of rounding numbers up and down has resulted in the total adding up to 99%.

The power of thorough market research is demonstrated by the success of the Orange region in attracting and satisfying a range of tourism market segments. At a business scale, market research was generally limited. For example, only 60 per cent of online survey respondents said they record their number of visitors.

Marketing, brand recognition and promotion systems were evident in all the regions considered. This included internet promotion with interactive maps and itinerary planning as well as the ability to search for produce, producers and food and farm-related events and activities.

State tourism promotions provided comprehensive tourism information; however, there was generally a limited focus on agricultural and food tourism. Marketing generally highlights the wine regions over food regions because of the complex nature of promoting a range of different food products—it is easier to develop a recognisable wine region brand.

Visitor centres are key sources of information. However, these centres do not necessarily hold information specific to agritourism and food tourism that is tailored to visitors who are specifically seeking agriculture-based experiences.

The use of ‘regional branding’ is under development in some regions. Branding goods as local or from the region was a popular strategy used by participants developing local niche products. A business operator said the following:

‘In our marketing we use the fact that Byron Bay is a beautiful destination—new packaging has an image of [the] farm and talks about Byron Bay and coastal position. We use the regional provenance.’

Regional produce identification or certification can support food tourism, ensuring that ‘local’ food remains authentic. For example, the recently established Hawkesbury Harvest label guarantees genuine Sydney region production. Regional branding of products such as Gippsland Beef and its associated Enviromeat label also assist with regional identification. Another example is the Yarra Valley Brand developed by the Yarra Valley Regional Food Group for promoting regional recognition of food, wine, tourism and agribusiness. However, as Knowd (Hawkesbury Harvest 2009, pers. comm., May) comments, the larger the diversity of products, the more difficult it is to achieve brand recognition. Accreditation or certification of tourism businesses is another marketing strategy used.

Regional food product guides have been developed in some regions, such as the Food of Orange District (FOOD) guide and the Hawkesbury Harvest produce guides. Food and harvest festivals and events allow marketing to be more tailored to an agricultural focus and are generally seen as critical in raising awareness of agritourism and food tourism opportunities among consumers. Key methods for building relationships between producers and consumers include farm and factory tours, product stories, farmers markets and community-supported agriculture (where consumers pay up-front for delivery of fruit and vegetables over a negotiated time-span). Managing consumer disappointment was an issue raised by a number of participants. Direct marketing and providing solutions to consumers was a key strategy employed by many operators, as was anticipating visitors needs and using local networks to meet these.

Agritourism and food tourism marketing and promotion can also involve novel approaches which aim to bridge rural and urban divides, such as Farm Day (www.farmday.com.au). As part of Farm Day, 500 farmers have been recruited to spend time with a city family during a weekend in May. Supported by Meat & Livestock Australia, this initiative was started by women farmers in the Western District of Victoria who wanted to promote Australian produce and educate the younger generation about food origins (L Heenan 2009, pers. comm., May). An objective of Farm Day is to promote farm experiences to city dwellers through face-to-face relationships (L Heenan 2009, pers. comm., May).

Tourism networks

As previously discussed, tourism networks are recognised by a number of researchers as a key element in regional tourism. All of the regions profiled had well-developed tourism networks, some of which supported agritourism and food tourism more than others. In some cases, specific tourism networks had been established around agritourism and food tourism. These are supported by, and interact with, more general regional tourism networks. General tourism information and support networks and specific agritourism and food tourism networks are both required. Marketing agritourism as a separate segment of tourism can have benefits for both of these sectors (Centre for Profitable Agriculture 2005). Knowd (Hawkesbury Harvest 2009, pers. comm., April) makes the comment that agritourism and food tourism networks should not replace the mainstream tourism networks, as their work is quite different.

A number of tourism networks exist for agritourism and farm tourism in Australia, including Australian Farm Tourism and the more recently developed Agritourism Australia. Australian Farm Tourism provides a coordination service for farm stays, agricultural technical and study tours and other on-farm activities. They also run a farm hosting program. They specialise in the international tourism sector, with the majority of interest coming from overseas (D Lyons [Australian Farm Tourism] 2009, pers. comm. April). Australian Farm Tourism is promoted by regional tourist information services throughout Australia. Another Agritourism network is WWOOFs (Willing Workers on Organic Farms) which has a network of 1200 farmers and attracts both international and domestic tourists.

Clustering and linkages

Evidence collected in the review indicates that successful agritourism and farm tourism businesses require clusters of development that complement one another and have the capacity to provide a diverse range of experiences to satisfy visitor expectations. These clusters can create an ‘experience boundary’ for tourists (R Wright [Southern Cross University] 2009, pers. comm., April). They include linkages between agritourism and food tourism businesses, as well linkages to other types of tourism enterprises, to provide an authentic regional tourism experience. As Knowd (2006) comments ‘linking with other businesses increases the overall attraction of the region for visitors’. This driver is enhanced by regional and local coordination, often by a champion or champions, and suitable proximity and access between businesses.

Networking and linkages between agritourism and food tourism and other tourism-related businesses was a key factor in creating successful experiences. A business operator had the following comments about the value of informal local networks:

‘... the real power is the loose cooperative, like minded people who you know...and, the less paper the more it works. But you’ve got to get down to putting it on paper, it leaves a trust audit.’

As one focus group participant pointed out, business models that go beyond the owner-operator and involve another layer through which several businesses can link can be helpful, making it more manageable for individuals and creating an improved tourism experience:

‘...the ownership model, the business model is basically owner operated and that I suspect for it to work on a broader scale there needs to be another level above that, so you’ve got six farms all who want to play some part in agritourism, but how do you join them? How do you link them...So other businesses that don’t own land, don’t own the assets can actually run in and provide those services. So there’s another level to this.’

Not everything about local networking was positive. For example, one business operator said that they initially joined a group but found that they didn't make much progress, so the business operator left, preferring to remain independent.

Integration and support

A number of integration and support needs emerged through the study, as discussed below.

Regional coordination

There were varying degrees of regional coordination of agritourism and food tourism across the case study regions with each region presenting a unique model for this. One aspect that was in common in all regional coordination efforts, was the development of multi-stakeholder forums. Some regions had experienced difficulty getting buy-in from agricultural industry and others had successfully achieved this. Regional coordination requires resourcing and dedicated staffing, and for many of the regions, lack of permanency had been an ongoing issue. The different models for regional coordination are elaborated on in the case study descriptions (Appendix C).

Informal cooperation can be fostered by regional coordination. For example, Taste Orange and its predecessors have managed to provide leadership while still ensuring responsibility by members. Connection to locality appears to be important. This has to correlate with the networking and marketing approach in the region. That is, promoting a region as 'the best' has positive marketing outcomes as long as people are willing to cooperate to promote the region and the name that tourists identify with. From a focus group:

'You reduce the pressure from one sector just to push their own barrow: everyone realises they've got to push one another's barrows and bingo, you're away.'

Training and development

There was evidence that people who get involved in agritourism are likely to have an existing skill set. From a focus group:

'The other thing that I think is pretty unique about Orange is that the level of skills and ability of the operators is very high...A lot of the wine growers that have come in have got significant business skills in other areas, a lot of connections, they're able to access funds, programs and grants that others wouldn't necessarily consider.'

Much of the focus on improving skills was related to helping people establish their businesses. However, improving the skills of existing agritourism operators was also raised. In summary, training needs areas identified by participants included:

- basic food safety and occupational health and safety training
- customer service, including providing a 'uniformity of experience' and ensuring that operators understand the needs of customers
- cultural awareness, with tourists from overseas in particular but related to the attraction of agritourism to different cultures within Australia
- understanding how to connect with the systems tourists currently interact with—'hitching on to the tourism wheel'
- understanding how tourism pricing/marketing works
- industry standards and certification options
- marketing and market research skills
- collaboration and networking
- study tours to other agritourism and food tourism regions both in Australia and overseas.

Learning to be an agritourism operator was likened to learning to be a farmer which is not straightforwardly serviced by existing courses :

'I can go to TAFE now and do a barista's course. But that doesn't teach you how to be a tourism operator. It comes back to agriculture, nobody teaches me how to grow strawberries but we used to have an ag extension service. That's gone by the wayside and if we're serious about anything in agriculture and we want to drive it, then maybe it needs to be driven a little bit through an ag extension service.'

Evidence collected in this study presents a case for training and education to support agritourism and food tourism that goes beyond available courses or learning experiences. Experiential learning through opportunities, such as farmers markets, were highlighted as important in helping develop agritourism businesses to the next stage, largely because they allow interaction with the consumer to improve the product.

One of the researchers involved in supporting agritourism had this comment about learning:

'A lot of farmers don't think about it as an opportunity to learn though. If it wasn't for the fact that we suggested they should use farmers markets as a point of sale to test their product, their price [and] their packaging and for consumer feedback, they may not have thought about it. It's not so much training, it's actually taking them through a process. ... There is plenty of training out there, it's what you don't know. You don't know what you don't know. It's knowing the questions to ask.'

A solution to this is the type of strategic intervention that occurred through the Southern Cross University program in Northern Rivers and Tropical North Queensland. Here, groups of people were taken through an exploration process to assess the tourism opportunities and to see how these fit with their own values and objectives. Such strategic intervention was valuable in developing the capacity of individual farmers to better recognise what they need to do to make their business viable.

Other tools to support new agritourism and food tourism businesses include the Sustainable Tourism Cooperative Research Centre self-assessment kit for land managers wanting to consider agritourism (www.crctourism.com.au/WMS/Upload/Resources/bookshop/FINALpdf_FarmCountryTourismTool.pdf) and workbook (www.crctourism.com.au/WMS/Upload/Resources/bookshop/STAGE2_FarmCountryTourism-FINAL.pdf). The 'Hidden Treasures of the Great Southern Farm Tourism toolkit-2009' has been developed to support operators in the Great Southern region of Western Australia to help identify their tourism assets and opportunities and to create a group tour (D Holly 2009, pers. comm. October).

With the exception of these and some other examples, there were limited agritourism and food tourism business focused learning experiences, although clearly TAFE and other providers could address specific training needs relevant to components of agritourism and food tourism.

The need for self-directed learning was also flagged during the Northern Rivers research. Participants in the focus group noted that there were multiple opportunities for businesses to learn, simply by visiting each other.

Improved food distribution systems

For farmers wanting to capture more of the value chain, marketing and selling to tourists can provide opportunities for learning and development, as well as interaction with other growers that can ultimately enhance food/fibre/wine production ventures and tourism-focused ventures within a farm business.

Agritourism and short supply chains go together. Among participants in the study, many primary producer agritourism operators managed their own supply chains, from direct selling to restaurants through to global distribution arrangements. Outcomes of these chains include improved returns for producers and stronger connections with consumers. That is, there are benefits for both the farmer/producer, and the consumer.

Having the business open to the public means less effort to find markets for produce, as well as better prices. Anecdotal information from numerous interviewees who sold fresh food from farm-gate arrangements suggested that they are direct selling to customers and making between two and three times the wholesale amount they would receive. Consumers are still paying the same price, but growers are getting a higher margin. 'Pick-your-own' reduces the cost for consumers even further. From one participant who operates a 'pick your own' berry farm:

'A lot of people come from far and wide that know they can pick a kilogram for \$12 compared with \$4 for a 100g pack back home. It nearly pays them to drive out here.'

A participant who runs a store distributing local products spoke about these benefits:

'For the consumer—fresh, pure unadulterated, , better value for money. Producers are getting a much better cut.'

Interaction with tourists can bring opportunities for building ongoing sales. One farmstay business on a working farm makes regular deliveries of fresh meat to previous visitors:

'Every two to three months we'll do a delivery to Sydney or Canberra, and that's bulk meat, we don't just deliver six sausages. That's half a lamb or full lamb, or 10 or 20 kilos of beef. People actually really love this, and they like to see where their food's come from.'

Improving food distribution systems is a key platform of the Southern Cross University-led agritourism and food tourism project in Tropical North Queensland.

Farmers markets

The evidence that farmers markets are an incubator for whole-of-agriculture value chain business development was evident in all of the regions. From one business owner:

'Participation in farmers markets is effectively training. (Name) didn't like it at first but loves the farmers markets now. All about telling stories. We have a story to tell and it's great.'

One business operator said the following about farmers markets:

'Farmers markets have been absolutely fantastic for lots and lots of people in this position over the last seven years or so. It's given a lot of people an income and regular cash flow and probably, most importantly, feedback and contact with the consumer which otherwise people are quite isolated from.'

Another business operator who has a regular stall at farmers markets, summarises the advantages of farmers markets:

'The outcome is a win/win for all farmers, communities and consumers. Farmers can charge more, food miles are reduced, the produce is fresher and because of the impact of climate change and the need for energy savings, consumers are helping the local community by buying local. There is also a social benefit to farmers. At first, the farmers were worried, but now they love the markets. It gives them an opportunity to interact with consumers (consumers say what is good and what they are looking for), and farmers can tell consumers what they do on their farms (e.g. fencing, waterways) to let them know they are not all despoilers.'

As one of the support services participants commented:

'It's agritourism but without people having to come to the farm.'

While it is not always the case, farmers markets are often a transitional step for fresh food growers while they establish other markets. Farmers markets can consume a large amount of time which is not profitable for all businesses in the long term. One support services participant commented that the transition from farmers markets to operating a tourism venture on the farm has its difficulties:

'The next step from farmers markets is to do that on your farm and run a farm and have infrastructure suitable for tourism – that is a much tougher model.'

Chefs and restaurants

Chefs, caterers and restaurants have a role to play in encouraging agritourism and food tourism through:

- putting an area on the map through achievements in cooking—such as Chef Hat awards
- valuing and promoting local food by making it available on menus
- encouraging local food distribution (although generally, restaurants drive this and suggest that it is unsustainable)
- promoting specific products from the region
- building a culture of cuisine
- creating demand for local food and local food distribution systems.

Strategic planning and monitoring

There were varying levels of strategic planning across the six case study regions, as discussed in Appendix C. Overall there had been limited planning specific to agritourism.

There was confidence that agritourism was making a difference, but finding figures to prove this is difficult. For example, the metrics most useful for monitoring the contribution of agritourism to communities are unclear. This is particularly important for organisations wishing to sponsor agritourism, such as government agencies who have invested in efforts to support agritourism. Representatives from a government department that has previously invested in agritourism and food tourism commented that they would like to sponsor more agritourism due to significant multiplier effects; however, the evidence to justify this investment was not generally available.

Resourcing

Policy and programs that have supported agritourism and food tourism in the past have rarely focused directly on agritourism and food tourism and are more likely to address wider objectives for regional, social and economic development. In Australia, there was limited evidence of long-term, strategic resourcing directly targeting agritourism and food tourism, although a number of programs contribute indirectly. European Union approaches, such as the Italian agritourism support program, provide insight into the universality of agritourism issues, as well as measures that can assist in resolving those issues (Pocaro, 2008).

Eighteen per cent of respondents to the online survey said that they had received funding to support agritourism and food tourism. This was largely from past, but also, some current Australian Government programs, as well as other sources. Sources of funding included the Australian Department of Infrastructure, Transport, Regional Development and Local Government, Dairy Regional Assistance Program, Bushfire Recovery Program, *TQUAL Grants* (Australian Department of Resources, Energy and Tourism), the post-Cyclone Larry recovery fund; the National Landcare Program, Catchment Management Authorities for fencing wetlands and creeks, the Regional Business Employment Fund and the Indigenous Land Corporation. There were also examples of corporate sponsorship and industry investment, including some agricultural industry funding of agritourism and food tourism.

Respondents said funding had supported their agritourism and food tourism business through training and further education, business start up, capital works, business support during low turnover because of fires, restocking plants, environmental and land rehabilitation works, road infrastructure, website construction, business plan development and infrastructure development (to support both production and tourism).

There were mixed views as to the value of external funding in promoting the sector however some participants put forward a case for support for promotion, skills and training, networking and infrastructure to advance agritourism and food tourism.

‘Well the point is that support would not only be promotion, but also (providing) training and infrastructure. The full package.’

Some strong views were expressed that the sector should not be subsidised and should be financially sustainable.

'History tells us where a business is started on the basis of a subsidy from government it is not a wise way to do business...If you believe that a subsidy is required to make the business viable then it is not viable.'

Another participant made a reference to a farm host program established in the 1980s and the importance of private investment:

'The reason why it was successful is because in the early days it was virtually totally privately funded. Therefore every single person who put money into it had ownership of it. As time went on it developed up, local government and state authorities (became involved) and so it lost its momentum. Businesses changed too, the major business in the towns changed. If you want to have the most successful tourism region, the people who are in the business have got to be prepared to put the money in themselves. So people have got to put their hard earned dollars into it because then they'll want to make sure it's done properly.'

Start-up support for businesses which might not have the capital to get going was suggested by several participants.

Expansion opportunities

If there is a cap on how much agritourism and food tourism can grow while remaining viable, participants in this study consistently said that they don't believe that we are close to reaching it. While some businesses complained that occupancy rates or visitation was low, most did not suggest that market saturation was the issue. Almost all of the business operators who discussed this issue with the researchers would welcome more agritourism businesses in their area and could see the value in providing diverse experiences that would potentially keep tourists in the area longer. An exception to this was having too many of the same food type in close proximity. Most of the farmers market organisers interviewed said that this was managed carefully at the markets. A comment at a focus group:

'The thing is, we would say to you, "Come and see us. Come and have a look at what we're doing". Because we're not scared of somebody else. We want you to pinch our ideas. We want to share our ideas. You will go and do something different. And people would say to me, "But aren't you scared of that competition?" It just makes us lift our bar. I'm not scared of lifting the bar.'

There were only a few examples of businesses winding down (these are discussed in the barriers section in relation to exiting an agritourism business) and while many operators were satisfied to keep the business small, many were enthusiastic about expanding further into tourism activities. Expansion plans or wish lists from businesses were extensive. Some examples are:

- the development of commercial kitchens to allow further value adding (both for individual businesses and as a shared community resource)
- improved regional websites
- opening city outlets representing food from a particular region
- adding a chalet or cottage to a business that currently has only farm-gate or farmers market activities
- expanding wedding facilities on-farm, with the appeal of farm weddings appearing to be increasing
- including nature tourism activities on farm
- increasing joint agricultural experience packaging across several businesses
- increasing tourism 'paddock to plate' experiences to other aspects of agriculture, forestry and fisheries (e.g. timber to furniture experiences).

4. Approaches to support agritourism and food tourism

Six key areas of support were identified to enhance both the regional and individual business involvement in agritourism and food tourism. These are drawn from the case studies and the desktop review and are:

- defining agritourism and food tourism
- better understanding of and response to markets
- strategic regional agritourism and food tourism approaches
- developing training methods and models
- integrated resourcing of agritourism and food tourism
- enhancing food product, distribution and supply systems.

These key support areas are discussed below.

Defining agritourism and food tourism

Participants communicated that the agritourism and food tourism sector is somewhat misunderstood. This comment was targeted at governments, business and the tourism industry. There was a perception among operators that agritourism is not adequately represented by lead agencies responsible for promoting and regulating tourism at the local government scale and also at the regional, state and national scale. In general, the agricultural industry sector is not significantly involved in agritourism and food tourism.

The institutional and regulatory environment has implications for agritourism and food tourism. Regulatory issues were frequently referenced barriers and support from local government initiatives was the second most important enabler, after marketing.

A supportive land use planning and regulatory framework was considered important to enable change or additional use within the agricultural land use zone. This was seen in some case studies where local government were addressing the hurdles associated with agritourism and food tourism activities, such as looking at rezoning areas of agricultural land for tourism development.

Participants recommended the development of a statement on agritourism, which they believed would encourage local and state government participation in supporting and promoting agritourism. The statement would include a definition and clarification of what constitutes agritourism and what doesn't. Participants also mentioned the need to have agritourism recognised as a contributing industry to the Australian economy, which needs to be fostered.

Better understanding of and response to markets

As discussed in the previous chapter, both qualitative and quantitative components of this study found that marketing was a primary enabler for agritourism, with a range of marketing approaches used. Word of mouth and other informal marketing strategies were employed at the business scale, while more formal approaches such as the coordination of festivals and events or promotions were used at the regional scale.

Whilst market research was seen as very important there was a scarcity of this, with some exceptions. Generally tourism market research was not being coordinated at the regional scale, possibly because of its high cost.

The difficulty in recruiting farmers into farm-gate trails in some regions is influenced by farmers not seeing themselves as marketers, but as producers. Further education and training is clearly required, the nature of which depends on whether producers elect to market their products and services themselves or have someone else do it.

Interaction with the consumer was a valuable aspect of agritourism and food tourism. Producers can potentially receive a higher margin by increasing interaction with consumers. Regional agritourism and food tourism visitors are looking for this contact. To deliver the experiences tourists are seeking, producers need to understand how they can add value to the urban consumer's quality of life. There is a potential gap between the expectations of tourists and supply in the agritourism and food tourism sectors.

Many growers do not see that tailoring their business to tourism demands is worthwhile. Ageing farmers are not necessarily interested and younger farmers may consider that there are more attractive entrepreneurial opportunities in cities (I Knowd [Hawkesbury Harvest] 2009, pers. comm., April). This is best addressed by providing a diverse range of farm and rural experiences to meet consumers' expectations.

Strategic regional agritourism and food tourism approaches

There is a case for regional coordination beyond the local area but there is debate about what this role should be. Suitable services that might fit within this role include:

- market research
- strategic planning
- developing principles for agritourism in the region
- regional marketing coordination, including regional websites
- supporting local food distribution systems
- mentoring programs
- coordinating extension and learning models.
- developing standards for services and products
- supporting local coordination
- assisting with the viability issues associated with this type of enterprise.

Creating a strategic framework or plan to support regional agritourism and food tourism development is important to the ongoing sustainability of such initiatives (R Wright [Southern Cross University] 2009, pers. comm., June). Scoping potential issues and opportunities, identifying partners and resourcing are important in the early stages of developing a regional agritourism and food tourism initiative (I Knowd [Hawkesbury Harvest] 2009, pers. comm., April; A Chapple [Harvest Highway] 2009, pers. comm., May). The consequences of not having a clear strategy in some regions appeared to be a proliferation of projects that were not linked.

Devising the appropriate staging for rolling out a regional agritourism initiative is also a critical consideration. Also important is choosing the appropriate boundary for the initiative which needs to take into account the potential for clustering and travel proximity issues. Some case study regions experienced issues related to of the large physical size of the region. A business operator within the Harvest Highway in Western Australia suggested this issue could have been resolved by staging the implementation one town at a time, instead of attempting to implement the initiative along the entire Highway. One-off initiatives, such as the farm trails promoted as part of the Orange Food Week, require different strategies and resourcing to the ongoing farm trails of the Hawkesbury Harvest. Further aspects of strategic regional agritourism and food tourism approaches are discussed in the following pages.

Organisational support

It is evident that successful regional agritourism and food tourism requires some level of organisational coordination. It is also evident that this requires appropriate committee structures and membership arrangements. Appropriate organisational structures, including a balance of membership between tourist operators and growers to encourage involvement from both areas, was noted as highly important.

The need for permanent secretariat support to maintain the coordinating organisation was raised by advocates in many of the regions. While it was noted that this support may not be required in the long term, coordination at a regional scale takes significant effort in the initial start up, which is difficult to entirely resource through volunteer effort.

Leadership and entrepreneurship

Leadership and entrepreneurship were considered to be key factors in developing and maintaining agritourism and food tourism initiatives. Support for regional agritourism often related to one or more key individuals who promoted the vision and helped to maintain focus and energy. Key individuals or committees were essential in supporting these coordinated efforts. Knowd (2005) comments on the importance of champions in the Hawkesbury Harvest model:

‘In rural situations where tourism is a complementary or supplementary economic activity, it is critical to the success that the local community or at least a few key people remain enthusiastic and committed...especially in the early planning stages where these individuals often drive the processes to fruition in a manner consistent with community aspirations.’

Early implementers were also important in demonstrating to others, particularly other producers, the benefits of agritourism and food tourism enterprises. Leadership in agritourism and food tourism was particularly demonstrated by producers who had an interest in tourism and direct sales.

Regional economic and community development

Community and regional economic development initiatives are vital to the development of successful regional agritourism and food tourism ventures. Regional economic development initiatives can assist in developing agritourism and food tourism projects, which in turn promote participation in local activities to develop and maintain regional social and economic values. This happens through the promotion of collective action, which is evident in many of the initiatives explored.

Programs and organisations can foster community and regional economic development through the development of local networks that generate community and regional capacity to successfully drive agritourism and food tourism ventures and innovation.

Facilitation and project officers

Project officers focusing on agritourism and food tourism were considered essential in many of the regions studied. Facilitator roles such as those in a number of the case study regions were essential to develop pathways combining agriculture and tourism, including the development of farm trails, research for provedore services and recruitment of farmer involvement. The tasks of these officers included supporting food distribution systems (to enhance regional food tourism), as well as small operator support. This work is usually outside the scope of general tourism support mechanisms (N

Craig [Australian Tropical Foods] 2009, pers. comm., April). Project officer roles ranged from tourism officers within local government to multi-agency funded positions.

Developing training methods and models

For business operators to offer a worthwhile farm visit and experience, specific training may be required. Knowd (2001) notes the lack of skills in this area, and the potential for negative tourist experiences which presents a risk for the entire agritourism network in a region.

The journey from producer to agritourism operator was observed to be difficult and challenging by many of the interviewees. A support services participant observed:

'Asking producers to make an incredibly difficult journey from being a producer to service provider—it's a completely different way of operation—need to recognise not many people can make that journey. Farmers can go their whole lives and never see a customer. [It's a] completely different exercise and skill set.'

Difficulty in engaging farmers was noted in all of the regional case studies. Training and development is required to build knowledge and create benefits from agritourism and food tourism for the agricultural and food manufacturing sector. A support services participant told of one farmer who offered their best quality produce at the farm-gate, rather than the seconds (as is often the case) and his farm-gate sales tripled. The same participant also commented that farmers need to have confidence that what they are producing is what people want and they need to determine pricing based on knowledge of the market. Similarly, participants communicated the need for consumer education about the value of agricultural produce.

The approach to supporting diversification used in 2006 by the Southern Cross University in the Northern Rivers Region of New South Wales, and Tropical North Queensland Tourism Development Program in March 2009, involved recruitment of farmers using agricultural networks, partnerships with local champions and local government (R Wright [Southern Cross University] 2009, pers. comm., June). This included providing targeted information to interested farmers through agritourism and food tourism field days or forums. A lesson learnt from this is that undertaking a recruitment process without first securing financial support for training and business planning programs will lead to a drop in momentum and participation. It is also apparent that without significant support to cover the cost of training for such programs, farmers are unlikely to engage or express interest beyond a field day (R Wright [Southern Cross University] 2009, pers. comm., June).

Integrated resourcing of agritourism and food tourism

In common with the issues faced by many family-operated businesses, agritourism and food tourism businesses face difficulties with resourcing, especially at start-up stage. The transition from an agricultural business to a business that combines agriculture and tourism requires significant support. It is those farmers who have an existing interest in tourism and marketing or those with viability issues who are most likely to make the switch (I Knowd [Hawkesbury Harvest] 2009, pers. comm., April). Often the transition requires significant investment and effort, and producers need a production base or other income to support them during the transition. Key resources required include financial resources to undertake the transition, infrastructure support (e.g. to transform a packing shed into a suitable tourism venue), training and education (such as in marketing and consumer relations) and risk and financial management (I Knowd [Hawkesbury Harvest] 2009, pers. comm., April).

Collaboration that benefits agritourism and food tourism can include integration across a number of areas, such as tourism, regional development, agriculture and health. Partnerships developed between key stakeholders from these sectors across all levels of industry and government are a fundamental step in providing a supportive environment for emerging agritourism and food tourism businesses.

Developing collaborations with other portfolios to support agricultural and tourism objectives in the case study regions included links with regional development, in most cases, and links to health portfolios. The Hawkesbury Harvest and Taste Orange demonstrate a model of integration across a number of objectives including health, agriculture and tourism. While the Hawkesbury Harvest initiative has a focus on farmers, it provides pathways for vertical and horizontal integration that allows farmers to link with tourism and hospitality (I Knowd [Hawkesbury Harvest] 2009, pers. comm., April), as well as progressing health, nutrition and food access objectives for the region.

Enhancing food product, distribution and supply systems

Developing new products and securing new markets

An important development phase in many agritourism and food tourism enterprises is the creation of new or value-added products that better respond to the demands and interests of consumers. This may include the development of provided services from existing products or different packaging and placement approaches. This can also include regional branding and other forms of marketing (as discussed previously in this report).

Access to food, wine and other local agricultural products and production experiences is the central drawcard for attracting agritourism and food tourism. This component of agritourism is driven by innovative responses to understanding consumers demand, including universal trends in developed economies who prefer local and small-batch products (Barstow 2002). This trend toward local preference and the integration between consumers and farmers is evident by the growth in Australian farmers markets. Coster and Kennon (2005) estimated that the annual income from farmers markets in 2005 was \$40 million, with the net annual benefit to communities is estimated as double this at \$80 million. Anecdotal evidence shows there has been considerable growth in farmers markets since these estimates (The Land 2006).

Creation of new value chains often requires significant investment, such as developing small-scale manufacturing or tourism outlets on-farm, and the development of systems of support for regional food and other products. Regional food systems are a key aspect of agritourism and food tourism efforts in all of the regions profiled.

Addressing issues of supply

Regional food tourism requires access to a mix of produce throughout the year. Issues with opening times at farm-gates were noted in some food and wine trails, where they struggled to achieve the critical mass and ongoing reliability of product or service. This reliability is needed to create a successful agritourism and food tourism experience (I Knowd [Hawkesbury Harvest] 2009, pers. comm., April).

Fresh food distribution systems have generally been set up to move volume in one transaction. Providing produce to enhance regional agritourism and food tourism experiences can involve altered distribution systems to allow for more diverse food flows to support regional food tourism (R Wright [Southern Cross University] 2009, pers. comm., April).

Improved value chain integration

Better integration between production and consumption offers organisations the opportunity to acquire competitive advantages by looking holistically at the chain of events surrounding the development, delivery and purchase of a final product in the end-market. This involves producers working closely with manufacturers, distributors, retailers and consumers to create improved value at every stage. This can enable producers to achieve better competitiveness and profitability by achieving a higher level of market-driven innovation than competitors (Burgelman et al. 1996; Gooch 2005). Marsden (1999) considers the development of integrated food supply chains is also important in supporting wider regional development.

Farmers markets are a key expression of the desire to provide better integration between consumers and farmers within the agritourism and food tourism initiatives explored (I Knowd [Hawkesbury Harvest] 2009, pers. comm., April; A Chapple [Harvest Highway] 2009, pers. comm., April). These avenues are particularly useful for niche product suppliers who have difficulty finding high-value markets through conventional means.

It is important to establish a local distribution system that enables commercial users of produce, such as hotels and restaurants, to identify and purchase local produce in a time-efficient and cost-effective way. Wright (Southern Cross University 2009, pers. comm., May) makes the observation that promotion of local produce could be more focused on the range of seasonal produce available in each region, rather than just niche or high-value products. Taste Orange is undertaking a campaign to promote the general produce of the area (e.g. the 'Eat an Orange apple' campaign) to raise awareness of local produce among residents and visitors (K Currie [Taste Orange] 2009, pers. comm., May). Regional food tourism is dependent on the ability to source and use local produce, which potentially requires inclusion of local wholesale distributors in the system (R Wright [Southern Cross University] 2009, pers. comm., June).

5. Conclusions

Regional agritourism and food tourism initiatives are at varying stages of development in different regions across Australia. They occur at different scales with varying levels of investment. The study revealed a range of issues which positively and negatively influence the development of regional agritourism and food tourism approaches.

This study provided a review of factors influencing agritourism and food tourism. The similarity between the issues in each of the six case study regions presents credible evidence of specific themes relevant to agritourism and food tourism in Australia. The issues are discussed in reference to the research questions that frame this study.

Many of these issues are relevant for tourism enterprises more broadly and are being considered through the National Long-Term Tourism Strategy released in December 2009. This Strategy stresses the importance of action on both the supply and demand side. Industry and representatives of all three levels of government are working to reposition the tourism industry through working groups to implement the Strategy. The implementation of the National Long-Term Tourism Strategy provides an important opportunity for the development for agritourism and food tourism. Appendix E provides information on this Strategy and contact details for the Working Groups.

Describing regional agritourism and food tourism

The conceptual framework underpinning this study, shown in Figure 1 in the introduction of this report, depicts the interrelationships between regional characteristics, lifestyle drawcards and institutional drivers. This conceptual framework was found to be a useful tool in ordering information from the six case studies, and is recommended for use in future research in this area.

Successful regional agritourism and food tourism initiatives are likely to display a common set of characteristics, including access to accommodation, appropriate infrastructure and proximity to nearby urban areas or easy access to these. They also require particular lifestyle drawcards that are based on food and agricultural experiences or values that interact positively with these. While lifestyle drawcards are discussed in the case studies in Appendix C, some characteristics of agritourism and food tourism businesses are summarised below.

Agritourism business operators include full-time and part-time farmers and people from other professions who may be moving or retiring to the country to pursue business or lifestyle goals. Just under half (49 per cent) said the primary purpose of the property was for agricultural production and another 29 per cent said the primary purpose was agritourism and food tourism. Most of the agritourism businesses encountered were family run (88 per cent). Corporate entities were also represented. The average property size was 60 hectares (excluding one outlier), indicating that small diversified farms are key contenders for agritourism and food tourism activities.

Over half of the online survey respondents (56 per cent) said that their agritourism business returned a profit in the 2008–2009 financial year. Twenty-one per cent of survey respondents reported that the proportion of income from agritourism was over 90 per cent and a further 25 per cent of respondents said agritourism provided less than 10 per cent of income, with the remaining respondents evenly distributed across the mid-ranges of income percentage.

Most agritourism operators were over 50 years old, and women were generally better represented as agritourism business owners and managers than is the general trend in farming businesses. There were also a number of Indigenous-led agritourism and food tourism businesses, which were seen as beneficial to local Indigenous communities. Agricultural production-based businesses involved in agritourism differed from many other farm businesses in that they had a much greater focus on direct sales of produce to customers, with only 12 per cent of survey respondents in this category saying they used a wholesaler. While there were some long-established businesses among the respondents, there were also plenty of newcomers represented, with the average time of business operation being nine years.

Drivers of and barriers to regional agritourism and food tourism

Regional agritourism and food tourism can provide food, fibre and wine producers with a means for business diversification, support for transition to new approaches and opportunities to create new avenues for revenue for themselves and their local communities.

Three different types of drivers were identified in this study to explain forces directing involvement in agritourism and food tourism: personal and business motivations; contextual influences; and institutional drivers which are larger than the individual business.

Table 3 summarises the key influences and barriers emerging from the study, which are further explained in the discussion below.

Table 3: Summary of key drivers, contextual influences and barriers to agritourism and food tourism

Personal and business motivations/drivers	Contextual influences	Institutional drivers	Barriers
Diversifying income	Declining terms of trade	Clustering and linkages	Regulatory issues
Lifestyle drivers	Labour shortages	Tourism networks	Lack of institutional understanding of agritourism
Wanting to educate about rural/farming issues	Changing land use and values	Marketing and market research	Lack of skills or perceived lack of skills
Retirement options	Drought and climate change	Integration and support—coordination at regional and local scales	Lack of farmer or agriculture industry involvement
Part or full transition from agricultural production	Industry restructure		Small business resourcing issues

Personal and business motivations

Personal and motivational influences largely related to income diversification, lifestyle choices (including retirement options) and a desire to share knowledge about the rural or farming environment.

In keeping with motivations of other family-run businesses, agritourism business owners are likely to be more motivated by lifestyle, family and other considerations than by purely profit-related motivation, which may apply to corporate or commercial tourism interests. This is shown in the response to the online survey, which found that just under 50 per cent of business operators surveyed said the income from the agritourism and food tourism business was enough to keep the business viable.

While it doesn't always involve diversifying a traditional agriculture operation, agritourism often represents a significant change to improve both lifestyle and economic viability for people living in rural locations.

Contextual influences

There was also a range of contextual issues which influenced participation in agritourism and food tourism. These largely related to changes in agricultural industries leading to declining profits and the need to diversify income sources. The effects of drought and other extreme weather events (e.g. cyclones) were another influence that led some businesses to diversify into agritourism and food tourism. Other contextual barriers included the 2009 global economic crisis.

Institutional drivers of agritourism and food tourism

Four key drivers of agritourism and food tourism (as outlined in the conceptual framework) were seen in varying degrees throughout the case study regions. These are summarised below.

Tourism networks

- Formal and informal linkages between tourism organisations and agritourism and food tourism businesses and organisations were present in most cases.
- Specific tourism networks focusing on agritourism and food tourism were less common.

Clustering and linkages

- Local-scale coordination, which occurred frequently.
- Clusters of tourism businesses that work together to support and promote each other are important in supporting resilient regional agritourism and food tourism approaches.
- Packaging tourism experiences to explicitly include food tourism was widespread. Inclusion of other agritourism experiences in packaged approaches was less well developed except in some cases.
- There was some evidence of the creation of agriculture-based tourism experiences and experience clusters, particularly through the use of food and wine trails.

Marketing and market research

- Marketing emerged as one of the most important drivers of success in agritourism and food tourism.

- Support for marketing of agritourism activities was considered the most important enabler option provided to survey respondents to rate. Marketing was also identified as an important driver by more than half of those interviewed.
- Market research emerged as a key distinguishing factor, targeting marketing approaches to differentiated markets, although there was limited evidence of formal market research at regional scales.
- Regional branding was used to promote produce in some regions (e.g. Orange, Gippsland and the Tamar Valley).
- There were a range of approaches used to engage and build relationships with urban consumers. Promotion of agritourism and food tourism through events was a key strategy.
- High profile promotion of niche and/or novel agritourism and food products was another key marketing strategy.

Integration and support

- Resources and support available to develop regional agritourism and food tourism varied across the regions.
- The presence of a specific organisation or process which focused on regional agricultural tourism an important factor in encouraging agritourism. It is also important to integrate agritourism and food tourism into general tourism approaches.
- Regional efforts to coordinate agritourism are generally based on the enthusiasm of a number of champions or lead organisations.
- Leadership and entrepreneurship; organisational support; regional economic and community development; awareness and training; and collaboration and development of effective local food distribution systems to support food tourism are important support factors at both the regional and individual business scale.
- Institutional understanding of and commitment to agritourism and food tourism emerged as an important enabling factor, particularly at local government scale.
- Coordination of regional promotion and linkages between individual businesses was critical to facilitate regional agritourism and food tourism initiatives.
- There was evidence of emerging collaboration between government portfolios (e.g. agriculture, tourism, regional development and health) to resource agritourism efforts.

Barriers to agritourism and food tourism

Key barriers communicated included issues with regulations which were not tailored to the agritourism and food tourism context. There were also issues with lack of involvement of farmers in leadership roles in agritourism initiatives; labour shortage or skill shortage issues; small business resourcing issues; signage issues; roads and infrastructure; skills and perception of skills; public liability; and lack of institutional understanding of or commitment to agritourism. A range of other contextual barriers were also mentioned including the global economic crisis and the deterrents of drought and extreme weather events (e.g. cyclones).

There are National Long-Term Tourism Strategy Working Groups considering many of these issues including Labour and Skills, Investment and Regulatory Reform, Tourism Access issues including transport infrastructure, Quality Assurance and Accreditation, and Industry Resilience, including to change climate.

Supporting regional agritourism and food tourism

In Australia, there is limited evidence of long-term, strategic resourcing that directly targets agritourism and food tourism. However, there a number of initiatives that make a contribution such as the National Long-Term Tourism Strategy (Department of Resources, Energy and Tourism 2009) and other integrated approaches that address wider objectives for regional, social and economic development.

Resources and support available to develop regional agritourism and food tourism varied across the regions. In many cases, coordinated approaches were subject to short-term funding arrangements. Tourism Research Australia (TRA) with the Department of Resources, Energy and Tourism provides a range of statistics and analysis, including regional data and analyses, on the tourism industry aimed at informing and supporting industry participants and decisions makers (see Appendix E).

Findings from this study, drawn from literature and primary research, suggest the following approaches are required to support agritourism and food tourism. This includes six major areas that build on and address the major drivers and barriers outlined in the study. These are summarised below.

Defining agritourism and food tourism

This relates to recommendations made by participants for the development of a statement or principles that address the perceived misunderstanding of the sector. This statement could draw on successful existing models of agritourism and food tourism in Australia as well as international approaches such as the Italian agritourism legislation. Such a statement may assist regulatory bodies to better understand the issues and the opportunities associated with agritourism and food tourism. It could also support the development of regional or local policies for agritourism and food tourism, as well as support the processes to assist regulations to be better understood and better integrated into agritourism and food tourism businesses.

Better understanding of and response to markets

The importance of this issue was highlighted by the noticeable benefits experienced by regions which undertook market research, market segmentation and other approaches to understand and develop markets for agritourism and food tourism. Marketing was noted as the most important enabler explored in the online survey. However, with some exceptions, there was little evidence of intensive effort in coordinated regional marketing or market research in relation to agritourism and food tourism. It is also important that there is coordinated action on the supply side to ensure that visitors have a quality tourism experience in a region when visiting individual agritourism and food tourism enterprises.

Strategic regional agritourism and food tourism approaches

The risks of setting up an individual agritourism and food tourism business are high and establishing these businesses often requires community and regional support. Both regional and local coordination emerged as an important factor in supporting successful agritourism and food tourism. Regional agritourism and food tourism organisations, while often volunteer run, require a degree of secretariat support and staffing to support their development. Regional agritourism and food tourism initiatives need to be based on appropriate boundaries and their implementation needs to be staged appropriately. To increase uptake by farmers, regional agritourism and food tourism initiatives need to be in a form that engages farmers and allows collaboration with tourism organisations. Supporting, promoting and sharing successful agritourism and food tourism coordination models is also seen as valuable. This includes models that ensure community

ownership, encourage leadership and entrepreneurship, and work with a multitude of actors. Methods for sharing this information include study tours and forums.

Developing training methods and models

This study found that there is a lack of skill and/or lack of confidence facing some agritourism and food tourism operators. There is potential to engage the agricultural sector more strongly in agritourism and food tourism. Generally, there appears to be a dislocation between agricultural sector skills and the knowledge required for tourism. Training support in marketing, product development and customer relations is needed. Currently there are few specific learning opportunities that directly address this. The need for experiential learning models which involve mentoring and group support were highlighted in this study, including the potential to use extension models similar to those used in agriculture.

Integrated resourcing of agritourism and food tourism

One of the key barriers to success in agritourism is resourcing issues. There was a perception that because agritourism and food tourism are traditionally considered outside of farming activities, these businesses are excluded from support opportunities available to agricultural enterprises. There was also a perception that these activities can also fall outside the traditional tourism support area. Support from diverse sources could assist in addressing this, including specific support to assist agritourism and food tourism businesses at the start-up stage.

Enhancing food product, distribution and supply systems

Regional food production and distribution systems are essential components that support agritourism and food tourism. Therefore, initiatives aimed at building agritourism and food tourism will benefit from efforts to develop regional food production, distribution and supply systems.

Appendix A: Detailed methods for the study

Desktop review

Many sources were consulted in relation to this review of agritourism and food tourism, including research literature databases, tourism organisations and Australian Bureau of Statistics (ABS) data. Representatives from the following organisations were contacted to assist in identifying key publications and information: Tourism Research Australia; the Department of Resources, Energy and Tourism: AusIndustry; the University of Western Sydney; the Australian Regional Tourism Research Centre; Australian Farm Tourism; Agricultural Productivity Division (Department of Agriculture Fisheries & Forestry); Tourism Potential; Australian Tropical Foods; state-based tourism agencies, including Australian Capital Tourism and Tourism Victoria. In addition a wide range of organisations representing agritourism and food tourism interests at regional scale were consulted.

Regional profiles

Regional profiles were created for 10 regions where agritourism and food tourism were known to occur. A number of data sources were consulted to gather information relevant to agritourism and food tourism in the 10 regions. Trends in population change and age distribution for each region were obtained from the Population and Housing Census data (2001 to 2006). Where necessary, statistical local areas (SLAs) were combined to represent data for areas which were not SLA boundaries. The number of agricultural businesses in the regions and the number of persons employed in agriculture, forestry and fishing industries were obtained from analysis of the 2001 and 2006 Agricultural Census.

Tourism data was obtained from Tourism Research Australia (2007). This data is gathered from two primary surveys conducted by the International Visitor Survey (IVS) and the National Visitor Survey (NVS). Additionally, the regional expenditure estimates for domestic day, overnight and international visitors are modelled using data from the 2007 NVS and IVS. The tourism business data are sourced from the ABS and are for the year ending June 2007. ABS and Tourism Research Australia sources do not always have the same regional classification. For the purpose of this report we used CPH and Agricultural Census for population and agricultural trends and tourism data from the IVS and NVS.

Case study assessment

Selecting the case study regions

The case study regions were drawn from the 10 regions explored in the desktop review. The selection of regions for case study investigation was guided by the intention to include representation of a range of factors including:

- different developmental stages of regional agritourism and food tourism initiatives
- different contextual conditions affecting agriculture and tourism, including demographic and economic profiles and climatic effects
- different regional agritourism and food tourism experiences as defined by the characteristics and lifestyle drawcards of the region
- different institutional and community support arrangements.

Case study data collection

The case study assessment involved four data collection methods: interviews; focus groups; site visits; and a survey sent to agritourism and food tourism operators in six regions (Tamar Valley in Tasmania; the Harvest Highway in Western Australia; Orange and the Northern Rivers in New South Wales; Tropical North in Queensland and Gippsland in Victoria). The study aimed to represent a range of stakeholders, including agritourism and food tourism business operators, local community members, regulators and administrators (Australian Government, state government, local council), tourism industry associations or non-government organisations, specific agritourism or food tourism support organisations and tourism service providers such as visitor information centres and tourism bureaus.

Study participants were identified through contact with key informants in each region and ‘snowballing’ techniques. Businesses were also identified through a review of agritourism and food tourism related businesses from internet directories and other tourism information.

A total of 409 data items were collected from the different methods, as shown in Table 4. Some individuals were counted more than once, such as those who were interviewed and also attended a focus group.

Table 4: Data collection as distributed by regions

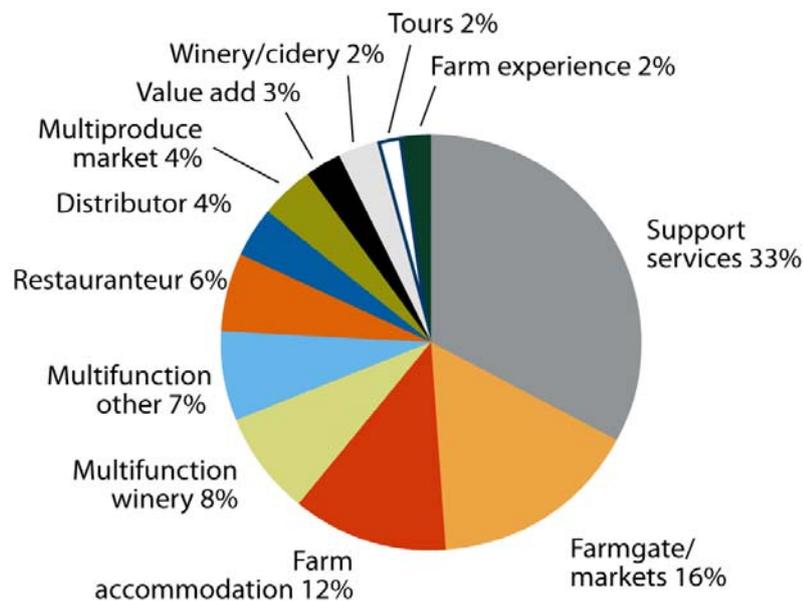
	Interviews	Focus group attendees	Site visits	Survey respondents
South West WA	40	19	19	12
Eastern Gippsland, Vic	21	21	12	23
Northern Rivers, NSW	32	11	15	9
Orange, NSW	19	11	12	20
Tropical North, Qld	16	17	8	23
Tamar Valley, Tas	15	14	7	14
Total	143	93	73	101

The origins of interview data is kept confidential in this report, except in the case of personal communications made during the initial desktop study. Personal communications are identified in the case of key informants who contributed to the desktop study. Information contained in the report on individual businesses is information that is publically available, via media such as websites and brochures. The different data collection components are described below.

Interviews

The case study assessment commenced in each region with phone interviews with both business operators and representatives from various support services, including government, the tourism industry and a range of organisations or individuals that supported, or interacted with agritourism and food tourism in each region. Phone interviews were followed by visits to agritourism businesses, where face-to-face interviews were conducted. Interviews were recorded and transcribed. The range of business types of interviewees, both phone and face-to-face is shown in Figure 17. The term ‘support services’ is used to distinguish people who support agritourism and food tourism from the agritourism business operators in this report.

Figure 17: Interviewees by business type



Interviews were semi-structured using a question checklist which included questions on perceptions of agritourism and food tourism in the region, issues, barriers and opportunities.

Business operators who said their agritourism and food tourism activity was mainly farm-gate sales or selling direct to farmers markets made up the largest proportion of business operator interviews (16 per cent), followed by farm accommodation (12 per cent) and multi-function winery (8 per cent). Multi-function refers to businesses which had more than one aspect, such as having a winery and accommodation. Multi-function operations made up 15 per cent of businesses.

While most business operator interviews related to on-farm businesses, a number of interviews were also held with business operators who contribute to the food experience in the region by interacting directly with food producers. This included chefs or restaurant owners (6 per cent), a number of owners or managers of provedore shops or other multi-produce shops selling local produce (4 per cent) and some local food distributors (4 per cent).

Focus groups

A focus group was held in each region between October and December 2010. The focus group facilitation followed the social learning model (Brown 2006), with discussion focusing on benefits, drivers, barriers and opportunities for agritourism and food tourism in the region. Adapting methods devised by Carson et al (2005), an agritourism and food tourism timeline that mapped the development of agritourism and food tourism over time was developed in each focus group. Focus groups were recorded and transcribed.

Online survey

In addition, an internet survey was distributed to over 300 agritourism and food tourism businesses as a triangulation method to enable cross referencing of issues collected through interviews and focus groups with quantitative data. The link to the online survey was sent to businesses located in

the six regions and was also forwarded to at least one coordinating body in each region for further distribution. There were 101 responses collected. Respondents were not required to answer all questions so the sample size varies for different questions.

The 35 question survey collected information about business operators (age, role, length of time in local district and on property, and location of property), the business (primary purpose of the property, ownership or leasehold, area, type of agritourism activities and products, agricultural industry, stage of development of business, number of employees, reasons for establishing the business and perceptions of success), income and profitability (proportion of income through agritourism, whether a profit was made in the previous financial year, perceptions of viability and external sources of funding), perception of barriers and the importance of a range of enablers of agritourism.

The online survey was collected by region but results are not presented by region. It was considered more accurate to present the combined data because of the variance in responses across regions.

Analysis

Analysis of qualitative data involved determining key themes arising from interview questions using adaptive theory and content analysis. Adaptive theory allows the development of theories from the data through the use of theoretical coding, taking into consideration existing theories (Layder 1998). Analysis of quantitative data from the surveys involved descriptive quantitative analysis only.

The validity of the emerging themes was determined through the use of saturation (i.e. no more information or themes emerging), and triangulation between focus group, interview and quantitative data, as well as literature or personal communication sources. Focus groups were also useful in checking assumptions or conclusions with primary informants.

Appendix B: Key features of agritourism and food tourism

The objective of the initial desktop study was to outline a framework for describing regional agritourism and food tourism, informed by an understanding of available resources and strengths from a selection of agritourism and food tourism regions.

Roberts and Deery (2008) have adopted Ritchie's (1993) strategies for creating a tourism destination and identified 10 segments that contribute to the identity of a wine and food region:

- natural attractions
- location/proximity to a major city
- the wineries and the wine produced
- primary food production and food service
- accommodation
- the environment (including natural attractions in the landscape)
- marine/coastal aspects of the environment
- heritage of the region,
- culture and the arts in the region
- sports and adventure activities.

Aspects of the tourism destination factors identified by Ritchie (1993) and Roberts and Deery (2008) have been adapted for this study in the development of a framework that describes the key features of regional agritourism and food tourism (see Figure 1 in the introduction).

The framework developed includes two important elements: *lifestyle drawcards* that are necessary to provide agritourism experiences, such as food and wine production and aesthetics; and key *regional characteristics* that enable or enhance these experiences, such as adequate services and infrastructure. The inner circle of Figure 1 shows aspects of these lifestyle drawcards and regional characteristics important for tourism generally and some which are specific to agritourism and food tourism. The framework also considers the drivers or supports of regional agritourism and food tourism. These are shown in the outer ring of Figure 1.

This framework was used as a tool for ordering information collected in case studies to describe regional agritourism and food tourism, particularly the drivers of innovation related to this sector. Elements of this theoretical framework are discussed briefly below.

Lifestyle drawcards

Lifestyle drawcards are necessary in attracting tourism to a region. The Hawkesbury Harvest model of community development (2004) identifies quality of life as a key factor in promoting and enhancing tourists' overall experience of the region. The term 'lifestyle drawcard' is used in the Hawkesbury Harvest model as an important factor that attracts people to the Hawkesbury region.

Agritourism and food tourism lifestyle drawcards specific to agritourism and food tourism revolve around the presence of, and access to, primary production experiences. This includes access to local wine and food, including wine and food trails. Value-adding—including large and niche manufacturing—packaging and regional labelling, assists in creating food and wine tourism experiences.

Consumption opportunities such as cafes, restaurants, food and wine tastings and other opportunities to consume local produce are also key drawcards. Opportunities for farm experiences can also be described as lifestyle drawcards that are important in regional agritourism. The authenticity of these farm experiences is an important factor influencing the success of regional tourism (Hawkesbury Harvest 2004).

Interacting with the agriculture and food-related activities are other lifestyle drawcards related to recreational activities and the environment, including natural attractions and aesthetics of the region. Galleries and art and craft businesses also act to attract tourists to a region. It is likely that it is a combination of these drawcards that helps to create the agritourism and food tourism experience.

Characteristics of regional agritourism and food tourism

A number of key characteristics were identified as critical mechanisms that support successful agritourism and food tourism innovation and experiences. These include: having a critical mass of tourism attractions and businesses (also a lifestyle drawcard); being easy to access, including being in close proximity to a city or major road (although in some cases remoteness is also a drawcard); and adequate infrastructure and services; and availability of accommodation facilities. Food consumption opportunities and local produce are also essential characteristics.

Drivers of regional agritourism and food tourism

Coordinated regional agritourism and food tourism does not occur without significant effort, collaboration and networks of support. Hall et al. (1998, 2000) and Roberts and Deery (2008) identify the key supports of regional tourism in general. They describe four categories of support, including business sets (i.e. interaction between visitor information services and individual businesses), organisational sets (e.g. accommodation that has many links with wineries, tour operators and restaurants), action sets (i.e. a coalition of interacting organisations), and tourism networks.

The following categories have been adapted from Roberts and Deery (2008) to reflect the broader structural drivers of agritourism and food tourism innovation and experiences. These include: clustering/linkages; tourism networks; integration and support; and marketing and market research.

Clustering and linkages

Clusters of tourism businesses that work together to support and promote each other have been identified in a number of tourism studies as important in supporting resilient regional tourism approaches. Bruch et al. (2005) describe a tourism cluster as a network of related businesses in a close geographic proximity with market identity and distinctive culture—which follow a common vision, strive for continuous innovation and work closely with local institutions and organisations. These clusters or linkages can occur among individual businesses and organisations that collaborate for the benefit of the region; for example, a winery and a tour company working together in partnership for mutual benefit or a tourist package that includes a farm experience (e.g. droving), accommodation and dining through three different businesses. A business relationship formed between a visitor information centre and a food and wine trail is also an example. Clustering and linkages are dependent on collaboration and coordination and the appropriate proximity of businesses (Mason and Docking 2005; Knowd 2001). Some important facets of clustering and linkages include partnerships and joint ventures between local producers and suppliers. This driver is enhanced by regional and local coordination, often by a champion or champions and suitable proximity and access between businesses.

Tourism networks

Tourism networks that go beyond groups of businesses are also important. Hall et al. (2000) noted the importance of networks created between stakeholders in reaching common goals for a region. Hall et al. (2000, 1998) applied network categories to wine tourism, using these to represent both the flow of business information within a region. Tourism networks may involve horizontal networking (e.g. between visitor information centres (VICs) or vertical networking (e.g. from operator to VIC). Taylor (S. Taylor [Tourism Potential] 2009, pers. comm. July) proposes three kinds of networks relevant to agritourism and food tourism: information networks; distribution networks; and specific sector networks. Tourism information networks, such as between information centres, are important for the creation of a knowledge infrastructure within a region and also for the dissemination of information both within organisations and throughout the region. Distribution networks such as Australian Farm Tourism provide links between consumers and the service or experience provider. Sector specific networks that support agritourism and food tourism can involve organisations or associations with particular interest in promoting agricultural values (e.g. the Winemakers' Federation of Australia). Not only do such networks assist in the pooling of resources for regional promotion, but they also lead to greater interaction between businesses. Networks have many benefits, such as encouraging linkages between tourism products, joint promotions and reciprocal business links (Gammack 2004). Agritourism and food tourism networks are supported by a range of organisations, including federal/ state/ regional and local tourism organisations, wine and food associations and VICs.

Marketing and market research

Marketing takes many forms, including brochures, websites, festivals and events and a range of advertising and promotional activities. Increasingly, regional food tourism experiences are being promoted as a package. Food tourism benefits from the regional identification that regional branding can bring. This can also have longer-term benefits, with some consumers attracted to purchasing food and wine from a region that they have visited. This driver includes any activities that promote and market regional agritourism and food tourism, including branding and labelling, festivals and events, web experiences and regional promotional campaigns. Market research emerged as a key distinguishing factor enabling appropriate marketing approaches to be targeted to differentiated markets.

Integration and support

This driver relates to community or organisational coordination and vision that is required to initiate and provide ongoing support to agritourism and food tourism at the regional scale. It also refers to the wider institutional support that is required for agritourism and food tourism. This may include integration of existing ventures into a more complete regional tourism experience. Support to regional agritourism and food tourism may also come in the form of a well-planned and community owned response to farming issues, as demonstrated in the Hawkesbury Harvest model. This driver occurs through innovation and collaboration often involving partnerships between governments, committees and associations. This driver is enhanced by investment and sponsorship from business, community and government in the form of education and training grants, business and industry development, research and development opportunities and regional development.

Appendix C: Case studies

Using the conceptual model outlined in Appendix B, agritourism and food tourism activities in six regional locations were explored (see Figure 18). Figure 18 also shows the location of four regions which were profiled for the desktop review but were not reviewed in the case study assessments; they are included here for reference.

The regions were selected based on knowledge of agritourism and/or food tourism activities occurring in those areas, and to ensure representation of a range of different circumstances and at least one example from each state (not including the Northern Territory and the Australian Capital Territory) and comprise:

Case study regions

- Harvest Highway (Western Australia)
- Eastern Gippsland (Victoria)
- Tamar Valley (Tasmania)
- Northern Rivers (New South Wales)
- Orange (New South Wales)
- Tropical North (Queensland).

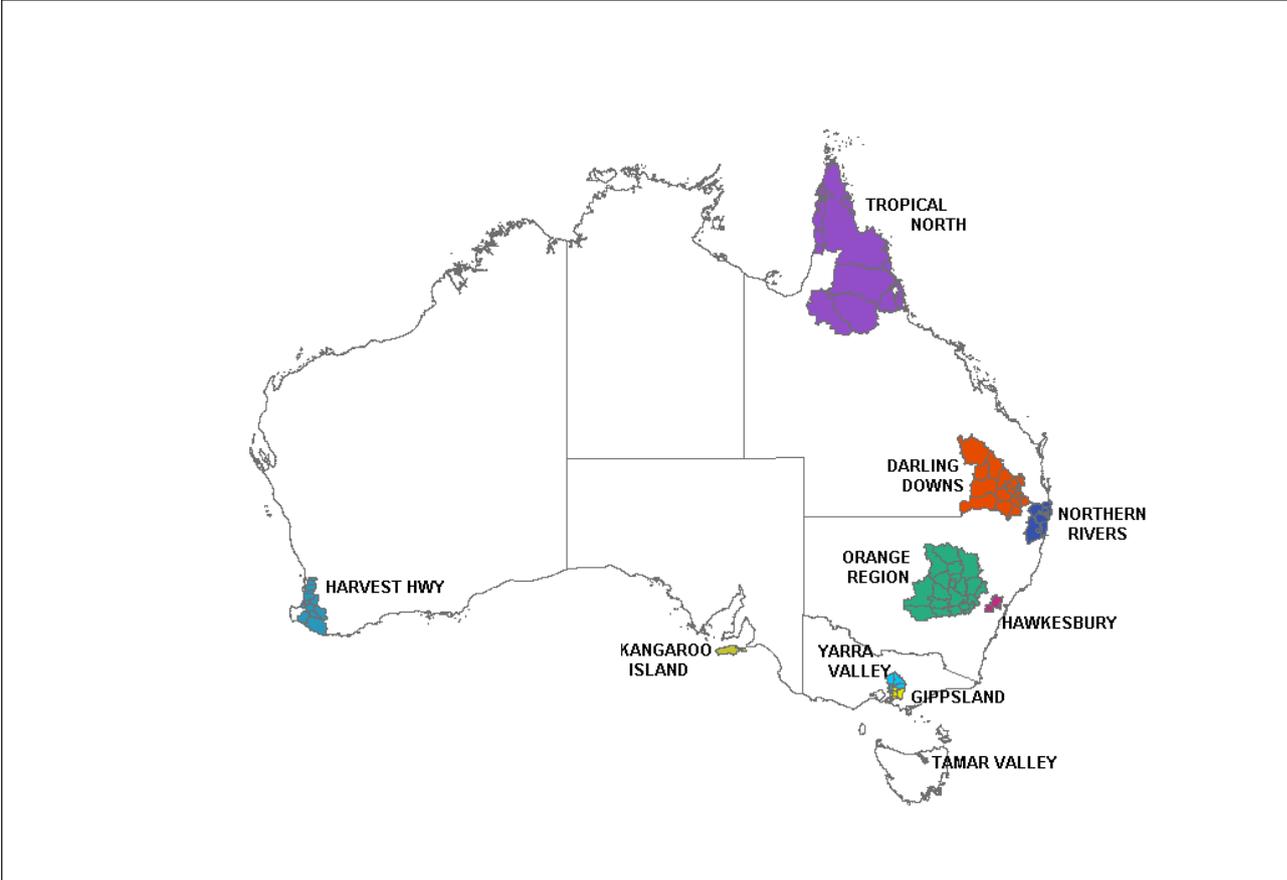
Regions for which a case study was not undertaken but which are included for reference

- Darling Downs (Queensland)
- Hawkesbury Harvest (New South Wales)
- Yarra Valley (Victoria)
- Kangaroo Island (South Australia).

Both agriculture and tourism are important in all of the regions considered. Agritourism and food tourism operations are occurring in all regions. In some cases there are specific agritourism approaches and in other cases this is integrated as part of general tourism development and promotions. The profiles of the regions allowed a number of initial observations outlined in Table 3 and summarised below.

- Some of the regions experienced an increase in estimated population growth between 2002 and 2006 with Eastern Gippsland the highest at 3.2 per cent and the other regions 1.0 per cent or above, with the exception of Yarra Valley (0.3 per cent), Orange (-0.06 per cent) and Kangaroo Island (0.7 per cent).
- In all regions with the exception of the inland regions (Orange and Darling Downs), tourism income was higher than income from agriculture.
- All of these regions supported a large number of tourism businesses, with approximately half of these being larger businesses and half being micro (one to four employees) or small (five to 19 employees) businesses.
- Tourism businesses outnumbered farm businesses in all regions except for Orange, Darling Downs and Kangaroo Island.
- Tourism expenditure varied greatly between regions, with average individual spending ranging from approximately \$120 per visitor in Melbourne East (representing East Gippsland) to more than \$300 per visitor in South West Western Australia, Tamar Valley and Kangaroo Island.

Figure 18: Locations of agritourism and food tourism regions profiled



The six case study regions are discussed in detail in the next section.

Table 5: Summary of agricultural and tourism demographic and economic information

Region	Population growth (%) (2002–2006)	Gross value of agricultural commodities \$ million (2006)	Number of agricultural businesses (2006)	Tourist spending \$ million (2007)	Visitors to the region (2007)	Number of tourism businesses (2007)
Hawkesbury Harvest	1.0	170	788	N/A	N/A	N/A
Harvest Highway	1.1	540	3419	N/A	N/A	N/A
South West WA¹				1400	4.6 M	5500
Yarra Valley	0.3	263	1676	N/A	N/A	N/A
Melbourne East²				314	2.6M	7000
East Gippsland	3.2	442	1945	N/A	N/A	N/A
Gippsland³				453	3.1 M	4400
Tamar Valley	1.1	23	298	540	1.8 M	2600
Northern Rivers	1.1	450	5901	1100	4.7 M	7200
Orange	0.06	1610	9912	962	4.5 M	6500
Darling Downs	1.6	1950	7460	569	3.3 M	5700
Kangaroo Island	0.7	49	341	82	179,000	200
Tropical North Queensland	2.0	953	3185	2800	4.2M	7100

Notes: ¹ As tourism information was not available specifically for the Harvest Highway region boundary, tourism figures are presented for the entire South West (inclusive of the coastal strip which is NOT included in the Harvest Highway region).

² As tourism information was not available specifically for the Yarra Valley region boundary, tourism figures are presented for the entire Melbourne East tourism district.

³ As tourism information was not available specifically for the East Gippsland region, tourism figures are presented for the entire Gippsland tourism district.

Source: ABS and Tourism Research Australia.

South West Western Australia—Harvest Highway

Regional characteristics

The boundaries for this case study are based on those used by the Harvest Highway organisation. These boundaries follow the South Western Highway from Armidale just south of Perth to Walpole on the south coast. It encompasses the major towns along the South West Highway including Serpentine, Harvey, Donnybrook, Balingup, Bridgetown and Manjumup and also the towns on the byways such as Jarrahdale, Dwellingup, Collie, Boyup Brook, Nannup, Pemberton and Northcliffe. These towns and their surrounds are all established tourist destinations. The Harvest Highway area does not include the major tourism attractions along the west coastal strip, such as Margaret River, Busselton and Dunsborough. Unlike these areas, the Harvest Highway is not characterised by a strong emphasis on wine routes, although cellar doors do exist in the area. Regional characteristics considered important in agritourism and food tourism in this region are shown in Table 6.

Table 6: Harvest Highway regional characteristics

<p>Regional Characteristics</p>	<p>Access Direct highway from Perth. Close to Bunbury. Ranges from 30 mins to four or five hours from Perth.</p> <p>Accommodation A range of facilities from bed and breakfast to camping facilities, including farm stays.</p> <p>Infrastructure and services Adequate town services and infrastructure.</p> <p>Critical mass Attractions situated along linear highway from Perth to Walpole, with relatively large commuting distances between tourism hubs.</p>
<p>Population</p>	<p>The estimated resident population of the Harvest Highway region in 2006 was 180 167 people. The proportion aged 74 years and over was 5.1 per cent, with 24.1 per cent of the population aged 55 years and over. Younger people aged 15 to 24 years made up 13.2 per cent of the population (ABS 2008a). The annual population growth of the Harvest Highway region steadily increased over the period 2002 to 2006 from 0.3 per cent to 1.7 per cent, with an annual average increase of 1.1 per cent (ABS 2008a).</p>
<p>Agricultural information</p>	<p>Based on the 2006 Agricultural Census there are 3419 agricultural businesses in the Harvest Highway region (including fruit and grape producers) (ABS 2008b), with a combined gross value of agricultural commodities produced of approximately \$540 million (ABS 2008c). There are 4385 people employed in the agriculture, forestry and fishing industries in the Harvest Highway region (ABS 2006).</p>
<p>Tourism profile</p>	<p>The Harvest Highway is situated within Australia's South West tourism region which covers the south-western tip of Western Australia. This tourism region is greater than the Harvest Highway and includes the coastal area south of Perth (Tourism Research Australia 2007). Tourism data were not available specifically for the Harvest Highway area. In 2007, \$1.4 billion was spent by visitors in the South West region, with domestic overnight visitors accounting for 71 per cent of total spend. There were a total of 4.6 million visitors to the region, of which 55 per cent were domestic day visitors. There were 8.9 million nights spent in the region, with 86 per cent spent by overnight visitors. In June 2007 there were more than 5500 tourism-related businesses in the region; 48 per cent were non-employing businesses and 45 per cent were small businesses (Tourism Research Australia 2007).</p>

<p>Lifestyle drawcards</p>	<p><i>Local produce</i></p> <p>Local produce from the area, which is promoted through the Harvest Highway trail and farmers markets, ranges across a wide variety of produce, including fruit and vegetables, eggs and meat, wine and cider, milk and cheese, fish and honey. There are a number of organically certified products available in the region.</p> <p><i>Consumption opportunities</i></p> <p>There are many opportunities to consume local food and wine in the region including a large range of cafes and restaurants. There are also novel opportunities to consume on farm or at the place of manufacture, such as the Have Cheese factory in Harvey and the Bridgetown Cidery (restaurant and cidery). An important feature on the calendar is the annual Harvey Harvest Festival, which promotes local produce, arts and crafts and other services. There are several successful farmer markets throughout the area and visitor numbers to these continue to grow.</p> <p><i>Recreation, attractions and activities</i></p> <p>Recreation is supported by the large amount of native forests and perennial river systems of which the Blackwood River is the largest. There are 24 national parks in the South West. The South West region has a diverse array of unique native plants and mammals, many of which can only be found in the South West corner. Many visitors are also attracted by the Bibbulmun Track, which extends around 1000 kilometres from the Perth Hills to the town of Albany on the south coast.</p>
	<p>Sources:</p> <p>www.harvesthighway.com.au</p> <p>www.australiassouthwest.com</p> <p>www.harveyfest.com.au</p>

Agritourism and food tourism business case studies

Agritourism and food tourism in the Harvest Highway area has an emphasis on farm stays and local produce, wine and some ‘experiential’ farm tourism. Generally there is a lack of organised food trails with the exception of the Harvest Highway itself. However there is plenty of opportunity for farm-gate or warehouse purchases from many of the fruit packing sheds located along the highway. Interviewees said that the prices received from these direct sales are generally double or more the wholesale price. Emerging aquaculture-based agritourism is a feature of this area.

Many of the businesses were providing a diversity of experience in order to encourage visitors to stay longer on the property. This is potentially related to the large distances between attractions in this region meaning there was often less opportunity to provide a package of experiences among businesses in a locality.

There is evidence of a diversity of reasons for commencing agritourism and food tourism enterprises in the South West region. There was also evidence of significant innovation being shown by operators in this case study region, both in marketing and in the kinds of experience on offer.

Traditional farming operations were well represented, with several farming operations transitioning to agritourism and food tourism, either partially or completely, while still retaining the farm base.

The Goldfields Orchard is a longstanding example of a successful diversification from full-time farming to include agritourism and food tourism. While the main business income remains from fruit grown on the property and some livestock, the restaurant, tours, farm and heritage goldmining experience package form an essential part of the business.

Royal Gala Tours are transitioning from apple industry to the tour coach business. Royal Gala Tours sell fruit direct from the packing shed, which is located on the South West Highway in Kirup. This location also doubles as an information centre for the coach buses which tour all over Western Australia.

In Boyup Brook, the owners of Chudacud have leased out their farmland which now provides a backdrop for their restaurant and gift shop. It is set in a paddock with the machinery sheds both functional and decorated with farm memorabilia. They hold weddings and other functions in their restaurant function centre which overlooks the paddock and vineyards. The theme is 'rural, rustic and relaxed'.

Bannister Downs is a dairy located in Northcliffe. Their farm café overlooks the dairy. The cafe and their unique value adding of their milk products provides a great example of combining agritourism with a working farm that has been in the family for generations.

The owners of Nirvana Farmers Market, also on the South West Highway in Donnybrook, ran a beef and, more recently, goat meat enterprise and have branched into a new venture, which is a permanent 'gardeners market'. It supports other businesses by selling their products. Centred around a plant and herb nursery they also stock local honey, avocados, macadamias and many types of jams, sauces and condiments. They also run workshops helping people to grow their own food.

There were clearly lifestyle drivers for many business operators with many examples of agritourism and food tourism driven by 'tree-changers', life-stylers or entrepreneurial business operators who may have come to the area more recently. Coming to agritourism and food tourism from an urban and professional career was common in this region. Often on smaller acreage, commonly around 40 hectares, these lifestyle-based businesses may be supported by off-farm or other income until the agritourism business holds it own.

The owners of Ferguson Farmstay, had their vision of a farm stay for some time and have located this in the scenic Ferguson Hills looking over the coastal strip. Their small vineyard the farm is used as part of the tourism venture. The owners of Eden Springs at Bridgetown initially ran a herb nursery in Perth. They now have a commercial herb garden and produce organic herb salt which they promote mainly through farmers markets.

Another important demographic represented in agritourism and food tourism enterprises is corporate groups or partnerships. This is well demonstrated by the Wine and Truffle Company based in Manjimup. The Wine and Truffle Company is the largest producer of fresh truffles in the southern hemisphere. With the fine food café and truffle hunting experience, it represents a unique agricultural tourism hotspot in the Manjimup area.

Ngalang Boodja Enterprise is an emerging Indigenous-led agritourism business in Collie. Supported by Wesfarmers Mining, state government and the Indigenous Land Corporation, this will potentially be the largest crustacean farming enterprise in the southern hemisphere. This is

being established using technology that treats acidic mine void water on the Wesfarmers mine site in Collie with assistance from Curtin University. As well as a significant aquaculture business for the local Ngungar community, this enterprise is also destined to be a tourism venture. There are plans to include cultural tours, fishing and a restaurant. With Indigenous trainees already studying aquaculture (through a Curtin University course delivered in Collie), training in hospitality will occur later to enable the local community to manage and run this operation in the long term. The first marron juveniles went in the pond in October 2009. It is anticipated that tourists will be drawn via partnership with an existing operation that tours mine sites.

In Pemberton, Forest Fresh Marron acts as a cooperative for marron farmers in the area, ranging from hobby growers to large-scale growers. Direct sales to locals and tourists from the shop-front represent a small but significant market for this business. King Trout Restaurant and Marron Farm, also in Pemberton, has taken the aquaculture product further and have a fishing experience and restaurant where customers eat freshly caught trout and marron.

Catalysts are needed to get the local products to consumers. There are a number of cafés and provedore shops located in the towns along the highway that sell food manufactured from local produce, as well as other fine food products.

Regional coordination of agritourism and food tourism

The Harvest Highway area is generally in an emerging or established phase of agritourism and food tourism development according to most interviewees, with relative maturity among many of the businesses represented in this study. However, interviewees commented that the area is currently in somewhat of a transition in terms of next steps for regional coordination of agritourism and food tourism.

As an agritourism and food tourism region, there has been a moderate amount of planning. Farmstay organisations have been around since the 1970s. Planning for the Harvest Highway commenced in the late 1990s and it was officially launched in 2002. The concept of the Harvest Highway emerged because tourism (including food tourism) related businesses along the South West Highway were all supported by local town tourist organisations but they were never marketed under one umbrella.

Harvest Highway is a community-run organisation that seeks to integrate agriculture and tourism objectives in the South West region, through coordination of activities that bring producers and their produce in contact with visitors to the region. This was achieved through the development and promotion of the Harvest Highway produce trail, coordination of farmers markets and farm-gate sales and a range of events and promotions.

Harvest Highway is run by a committee comprising tourism, farm and value-adding business operators. Other stakeholders involved in agritourism and food tourism include a range of individuals, councils and government and tourism industry representatives, many of whom were brought together under the auspices of the Harvest Highway committee.

While the Harvest Highway committee is still active, there has been limited active formal coordination at regional and local levels to support agritourism and food tourism businesses since the Harvest Highway coordinator position ceased in 2008. Harvest Highway was acknowledged both by those involved and those outside of the organisation as an innovative vision:

'Harvest Highway provides a link between agriculture and tourism but also between tourism in all towns along the highway.' (business operator)

'The Harvest Highway helped me because I spoke to people who were further along than I was and it made it seem more achievable—more peer support than something from outside.' (business operator)

The concept of the Harvest Highway was attractive to industry and government because it covered such a wide span. However, at this scale it was difficult to manage and also difficult for businesses to link across the whole area. One agritourism operator in the region said:

'The reason why I didn't get involved is that I suppose I saw the difficulty in linking businesses together even within a region, let alone a very long geographic (region). I saw that as a great vision, fantastic, but I just couldn't commit my time and passion to that... it had big hurdles to get over.'

Likewise, one business operator commented that it was:

'...too big at 320 km—involving seven different towns and not every town wanted to come on board. You can't get everyone to drive 200 km to a meeting. It should have been opened up in the first town and then move through the towns—e.g. Serpentine, then Pinjarra, then Waroona. Make it successful in one area but not too vast.'

Another issue was attracting farmer membership. At the focus group, most agreed that a membership base, whereby memberships granted some privileges not available to non-members was essential to maintain enthusiasm and commitment. A business operator who runs a successful business along the highway summed up the issues with Harvest Highway:

'Problems with scale, staging and resources.'

Despite these issues, there was overall support for the Harvest Highway:

'Harvest Highway is an established brand—suggest putting money into Harvest Highway to get visitors centre engaged.' (business operator)

Drivers and enablers of agritourism and food tourism

The timeline in Table 7 was constructed by focus group participants and outlines the key factors and activities that contributed to the development and progression of agritourism in the region.

Table 7: Timeline of agritourism activities in the Harvest Highway area

Date	Activities contributing towards agritourism and food tourism
1960s and earlier	Farm-gate sales.
1970s	Farm stay host organisations formed.
1980s	Expansion in farm stays. Wine industry cellar door sales (from 1990s in Donnybrook). Local town markets.
1990s	Internet marketing. Regional branding of products (e.g. Harvey Beef). Increased focus on value adding of local produce. Town planning changes to create more aesthetic townships. Establishing the Harvest Highway organisation.
2000s	Grower cooperative value chains and marketing (e.g. Challenge Dairy) Establishment of farmers markets throughout area. Official launch of the Harvest Highway.

Farmers markets were referenced by 33 per cent of interviewees as an important enabler for agritourism and food tourism in the region. An interviewee representing support services commented:

‘The farmers markets have been very successful. For farmers it’s not a huge commitment when not on their farms. Small businesses can’t afford a huge amount of time.’

Farmers can make more than through wholesale, with references to receiving double or more the wholesale price from the markets (business operator). Farmers markets are also important as a training ground and as a way to test the product directly on consumers. They are particularly important in bringing visitors into the town, with a tourism website devoted to the area having the majority of traffic on farmers markets and farmstays (business operator).

Communication with consumers was the next most frequently referenced enabler of agritourism and food tourism in this region. This included novel approaches to engaging with consumers, such as the idea for a South West ambassador located in Perth (South West WA focus group). Also noted was the friendly and warm style of communication common to the operators in the area, described by an interviewee representing support services:

‘People love the fact that they are treated like real people, not like consumers. These small businesses are so excited about sharing their experience—this is related to sustainability of marketing—motivated by the joy, not money.’

Clustering and informal cooperation between agritourism businesses was not highly evident across the region, although there were exceptions, and many of the interviewees recommended that more effort to create linkages would enhance agritourism experiences in the region.

Potentially because of the large distances between businesses, it was quite common to see multiple experiences within the one agritourism business. One business operator who ran a farmstay with multiple activities (farm chores, pony ride, walking, fishing, patting animals, tennis, cellar door) observed that the more attractions within the one venue, the more this opened the market to a variety of tourism segments.

Barriers to agritourism and food tourism

Labour shortages and costs, especially with regard to labour for farming but also for tourism, was the most frequently referenced barrier for interviewees from the Harvest Highway region. As in other areas, family labour is the preferred backbone for agritourism businesses and in the South West some businesses preferred to stay small rather than employ outside the family. This can create problems in servicing agritourism businesses. A support services interviewee observed:

'Harvest Highway was dealing with small farms, usually family run and therefore farm-gate sales proved difficult because they didn't have extra labour to service them.'

There were also a number of comments about the quality of the labour force available. A business operator who runs a horticultural and agritourism operation commented that labour solutions such as temporary worker migration schemes are needed for the South West if farming is to be competitive:

'Labour is a big issue. Backpackers are very variable. Well, you've got to train them up every year again and you're paying them good money ... and every year's the same deal again. Well, as far as orcharding goes, if they want to make orcharding competitive with the rest of the world then we should be allowed to bring in [workers from overseas], house them here on the farm.'

Skills and perceptions of skills was the next most frequently referenced issue. Support service interviewees, which included participants working in agritourism support roles such as tour guides, regional tourism body representatives or local government representatives, observed that many farmers didn't have the skills or the confidence to branch into agritourism. This translated to issues with recruiting farmers to be involved in the Harvest Highway. A support services interviewee suggested:

'(Harvest Highway) found it hard to recruit farmers because they don't see themselves as marketers, they see themselves as producers. Same with farmer markets. Need a big education effort to let them get on with growing and have someone else market it.'

As in other regions, interviewees suggested that farmers dealing with tourists may need training to assist them to offer a worthwhile farm visit. Another comment about the need to improve the perception of the value of agriculture among farmers and consumers was made during an interview with a support services representative:

'Farmers have very low self esteem—need to have confidence that what they are producing is what people want. For example, a farmer selling oranges (at the farm-gate) for \$1/kg

because he gets 40 cents wholesale—we need a whole pile of education around that. Also (need education) for consumers on the value of agriculture.'

The strong emphasis on the need for skill development may be related to the farm-gate sales orientation of the Harvest Highway, where businesses are more likely to have a focus on production rather than tourism. A support services participant observes:

'Farmers are just not thinking that way—they are entrenched in the way they do business and tourism is not part of their business. Tourism is an umbrella activity—not a separate activity—customers often are tourists.'

Other agritourism business operators such as farmstays and farm café/restaurant owners who were interviewed had positive attitudes towards their skill sets.

Regulations were the next most frequently referenced barriers. In addition to issues noted in other regions regarding council approvals, issues relating to priority agricultural zoning preventing businesses from expanding were mentioned. One of the support services participants observed:

'Priority agricultural land is an issue. Because a broad brush stroke is applied, it includes farms that may not be economically viable. Zoning is an issue—it is done to protect agriculture, but presents a hurdle for tourism.'

Issues associated with a lack of understanding of the particular needs of agritourism and food tourism were raised by interviewees in this area, particularly with regard to the tourism industry. It was also noted that traditional views in relation to both agriculture and regional development needed to be worked with to foster understanding that agritourism and food tourism had the potential to deliver on a number of community development objectives.

Other frequently referenced barriers to agritourism and food tourism pertained to small business resourcing issues, including the issue of small businesses not being able or willing to invest in cooperative marketing efforts. Participants also noted problems associated with the seasonality of tourism and this unpredictability putting extra strain on limited resources.

Signage issues, such as council regulations prohibiting signage, were also mentioned frequently as a barrier. However, this did not appear to be as significant an issue as in some other regions.

Solutions and opportunities

According to both business operators and individuals representing support services, there is room for expansion of agritourism and food tourism in the Harvest Highway area.

Support needs mentioned included improved web marketing and promotion 'to get people enjoying one farm experience so they go on to the next' (business operator). Also suggested was further training and development to assist farmers to identify opportunities for agritourism from their existing resources:

'For example, if you have koonacs (i.e. yabbies) in your dam—take them koonac fishing. If you have shearing—get a roster for shearing across farmers.' (support services)

Also suggested was expanding the agritourism opportunities to other industries in the region, such as developing timber-related tourism experiences for example, following the life-cycle of a log to a chopping board or other furniture, or developing tours of government and private aquaculture farms.

The need for better coordination and collaboration of agritourism and food tourism was highlighted by a number of the interviewees and at the focus group, particularly with regard to the need for a dedicated person to oversee this coordination. As mentioned earlier there was strong support for continuing to build on the community-managed Harvest Highway model. Based on the significant knowledge held among stakeholders about its benefits and shortcomings, it was recommended that collective wisdom/experience should be captured through a review and used to improve this model.

Northern Rivers

Regional characteristics

Located in the north-east corner of New South Wales, the Northern Rivers region covers 20 896 square kilometres, has a warm subtropical climate and includes rural, urban, forested and coastal areas featuring three river valleys (Tweed, Richmond and Clarence) and coastal escarpment. As a tourism region, this area includes the Southern Gold Coast, as there is significant tourist movement between the Byron Bay/Lismore area and the Tweed Heads/South Gold Coast areas, hence this study covered this broader area.

The bulk of the region's population is found on the coast. Land used for agriculture, forestry and environmental conservation links the region's communities, villages and other urban areas. Agriculture produced in the Northern Rivers includes dairy, tropical fruits, cattle, poultry, plantation forests, soya bean, sugar cane and aquaculture. In recent years, many new and niche agricultural operations have emerged in the region. Coffee, bush tucker and hydroponics are showing domestic and export potential.

The regional context identified as important for agritourism and food tourism include an expected increase in population over the next 20 years and related land use pressures. Increases in land prices are potentially limiting the capacity to diversify agricultural pursuits. The community is characterised by concerns about sustainability and health, influenced by lifestyle-focused migration to this area over the past decades. Table 8 summarises information on the Northern Rivers region relevant to agritourism and food tourism.

Table 8: Northern Rivers regional characteristics

Regional characteristics	<p><i>Access</i></p> <p>Three hours drive from Brisbane. Ten hours from Sydney.</p> <p><i>Accommodation</i></p> <p>Ranging from bed and breakfast to campsites.</p> <p><i>Infrastructure and services</i></p> <p>Strong transport and economic links to New South Wales and south-east Queensland.</p>
Population	<p>In 2006 the estimated resident population of the Northern Rivers region was 280 082 people. The proportion who were aged 74 years and over was 8.8 per cent, with 30.3 per cent of the population aged 55 years and over. Younger people aged 15 to 24 years made up 11.7 per cent of the population (ABS 2008a).</p> <p>The population of the Northern Rivers region is growing steadily. In the five years to 2006, the population of the Northern Rivers region increased by an annual average of 1.1 per cent a year (ABS 2008a).</p>
Agricultural information	<p>Based on the 2006 Agricultural Census there are 5901 agricultural businesses in the Northern Rivers region (including fruit and grape producers), with a combined gross value of agricultural commodities produced of approximately \$450 million (ABS 2008b, 2008c). There are 6092 people employed in the agriculture, forestry and fishing industries in the region (ABS 2006).</p>
Tourism profile	<p>In 2007, \$1.1 billion was spent by visitors in the region, with domestic overnight visitors accounting for 69 per cent of total spend. There was a total of 4.7 million visitors to the region, of which 57 per cent were domestic day visitors. There were 8.2 million nights spent in the region, 80 per cent spent by domestic overnight visitors.</p> <p>There were more than 7200 tourism-related businesses in the region, of which 48 per cent were non-employing businesses and 47 per cent were micro or small businesses (Australian Tourism Research 2007).</p>
Lifestyle drawcards	<p><i>Local produce</i></p> <p>With a subtropical climate, a unique range of produce is grown and processed, including coffee, sugar, tea, herbs, limes, bananas, avocados, macadamias, sweet potato, mangoes and a host of other vegetables and tropical fruits. Seafood and fresh produce also feature in the region.</p> <p><i>Consumption opportunities</i></p> <p>The region is known for its seafood and beef. The New South Wales Department of State and Regional Development hosts the Northern Rivers Regional Food and Wine Showcase in Sydney. There are several farmers markets situated throughout the region.</p> <p><i>Recreation activities</i></p> <p>The Northern Rivers is home to many artists, an active theatrical community and many music and arts festivals. There is also a range of outdoor activities available.</p> <p><i>Natural attractions and aesthetics</i></p> <p>The Northern Rivers region has national parks and coastal activities.</p>
Sources	<p>http://avalook.com/nsw/nrivers.htm</p> <p>www.northernriversacc.com.au/pdf/Strategic%20Regional%20Plan%202007-2010.pdf</p> <p>www.investnorthernrivers.com.au/admin/uploads/Annual%20Report%202008%20FINAL%20221208.pdf</p> <p>www.investnorthernrivers.com.au/index.php?pageid=18</p>

Agritourism and food tourism businesses in the Northern Rivers region

The following represents a few of the businesses/events in the Northern Rivers region. Given the strong presence of farmers markets in this region, attempts were made to speak to growers at the markets. The New Brighton markets are run once a week and feature a wide range of local produce, including fresh sprouts, tropical fruits, cheeses and value added products made from macadamia nuts and similar. According to stallholders, shoppers tended to be locals and this was confirmed by research undertaken by the New Brighton farmer's market committee. The markets are run by a joint farmer/consumer committee which employs a part-time coordinator. The Lismore Organic markets have been running since 1999 and are held each Tuesday morning. This is a farmer-run committee. In addition to supplying a range of organic produce, the association of growers runs quarterly farm tours to improve linkages between consumers and growers. There are also markets at Bangalow, Byron Bay, The Channon, Nimbin and Mullumbimby, as well as a number of smaller markets in the region.

Tropical Fruit World, situated in the Gold Coast/Tweed area, started life as an agricultural research institution in 1937 and purchased became a family-operated fruit plantation. It became a tourism attraction in 1983. Tropical Fruit World offers tours of its extensive tropical fruit farm, picnic grounds and fruit tastings. They have around 100 000 visitors annually.

Eltham Valley Pantry is located in the valley between Byron Bay and Lismore. The restaurant/café is based on a working pecan farm, with farm and factory tours available. The restaurant stocks a range of pecan products.

The House With No Steps was established in 1971. It is a working farm and tourism venture which offers employment for people with disabilities. There are over 80 people with disabilities employed in the venture, including in agricultural, administrative, tourism and hospitality positions.

There are a number of tourism-related Indigenous businesses in the region. These include cafés with menus based on bush foods and cultural tours, including bush food experiences such as Bundjalung Cultural Tours who run tours in the Tweed Heads and Mullumbimby areas. The Yarrowara Aboriginal Cultural Centre is located at Corindi Beach. The centre has dormitory facilities for 76 and a café/restaurant. The centre sells herbs, jams and seasonings, along with bush tucker plants such as native ginger, native sarsaparilla, lemon myrtle and Davidson plum. Walks and teaching about bush tucker and how to survive in the bush are also offered. As well as the tourism and bush tucker activities, the centre runs a number of support services for the community, including a doctor's room, a venue for women's business (including a women's gathering once a year) and an 'Elders Olympics'.

Regional coordination of agritourism and food tourism

Perceptions on the establishment as an agritourism region ranged from 'in its infancy' to established. The major emphasis appears to be food cafes and local food restaurants, farm accommodation, wine and access to local produce, especially through farmers markets, with less examples of working farm experiences than some of the other regions. Eltham Valley Pantry in the Byron–Lismore area and Tropical Fruit World in the Tweed Heads area provide notable examples.

Participants mentioned a lack of cohesion, coordination or singular focus in the region, but felt there was a strong base on which to build these. There has been significant activity to support agritourism in the Northern Rivers region.

Efforts in relation to agritourism and food tourism have largely been about promoting food, with food tourism identified as a strength in the region. Food tourism initiatives have included Taste of Gold Coast, Taste the Tweed, the seafood discovery trail and the Regional Cuisine project run by the Northern Rivers Development Board and more recently Regional Development Australia (2000–2005).

Important projects supporting agritourism and food tourism include the Southern Cross University business operator mentoring project and the new Food Links project funded by the New South Wales Envirotrust urban sustainability program and driven and supported by local governments.

Enablers of agritourism and food tourism

The timeline in Table 9 was constructed by focus group participants and outlines the key factors and activities that contributed to the development and progression of agritourism in the Northern Rivers region

Table 9: Timeline of agritourism activities in the Northern Rivers Region

Date	Activities contributing towards agritourism and food tourism
1973	Aquarius Festival
1980s	Farm gate stalls (honesty boxes). Promotion of the Beach Hotel by John Cornell and Paul Hogan. Frank’s river caravans (local farmer hiring out caravans on his farm). Branding Byron commences. Tropical Fruit World starts.
1997	Regional Cuisine fairs, festivals and awards (Byron/Kingscliffe).
1999	Farmers Markets (Lismore Rainbow Region organic farmers markets start, others follow).
2000	Chefs start to demand local produce (influence of Fins restaurant).
2006	Cooperative Research Centre for Sustainable Tourism field days. Southern Cross Tourism Program—farm and nature tourism develops linkages.
2007	Change to NORCO milk policy to allow milk producers to sell to multiple buyers. Eltham Valley Pantry opens for business.
2008	Northern Rivers Food Forum. Northern Rivers Food starts as an organisation.
2009	Foodscape tours begins. Food Links project.

The regional farmers markets were considered a key enabler of agritourism in the Northern Rivers region. The smaller, weekday markets seemed to be attended predominantly by local people, but in some cases this was linked to tourism, and to creating a more viable business more generally.

In addition to providing an outlet for farmers to sell produce, the farmers markets in the region were seen as an important marketing strategy for farm businesses in the region through the opportunity they provide for direct interaction with the consumer. This was mentioned during an interview with a support services participant.

‘There is also a social benefit to farmers. At first, the farmers were worried, but now they love the markets. It gives them an opportunity to interact with consumers—consumers say what is good and what they are looking for, and farmers can tell consumers what they do on their farms, like fencing [and] waterways, to let them know they are not all despoilers.’

Several participants also mentioned that local chefs and restaurants were playing a role in shortening the supply chain and increasing the profile of regional produce, and consequently contributing to agritourism. In particular, the role of celebrity or high profile chefs in the region was considered important, as communicated by one of the support services participants.

'Last year we did 100 mile food challenge, great apprentice cook-off—[with] guest chefs. Local producers provided the food. ABC broadcasted from on site.'

As mentioned above, networking, mentoring and training opportunities were also considered an important enabler of agritourism and food tourism in the region.

Barriers to agritourism and food tourism

Similar to many other areas, business operators and support service staff identified many regulations as major barriers to the development of agritourism and food tourism in the region. The perceived problems were related to development controls, roads and signage and agricultural protection legislation restricting farmers' ability to innovate in agritourism. In particular, some participants felt that regulations were inhibiting the development of agritourism and food tourism in the region.

'[The council] needs to be more supportive of agritourism. They reject proposals and it concerns me that they want to take the pressure off [developed areas] and seek out other accommodation in other places like the Hinterland. But it seems that no progress had been made to follow through on planning but [development] proposals for accommodation have been knocked back.'

The infrastructure costs associated with setting up an agritourism business in order to meet the requirements of a development application were considered prohibitively expensive for small businesses as described in an interview with a support services participant.

'For example, [to do] farm tours two days a week on a small scale, four hours each day, the council requires road [upgrades] disabled toilets—[it's] too expensive and there's a lot of uncertainty...from the proprietors' point of view.'

Also one business operator commented:

'My property has 3 km of dirt road—I would have to pay for the road to be sealed—as a primary producer, that is constraining.'

It was felt that this barrier was caused at least partially by an inadequate definition of agritourism. Business operators and support services staff were both keen to see the development of a better definition for agritourism that included it as part of everyday on-farm activities.

'There needs to be definition and clarity as to what constitutes agritourism and what isn't and under what circumstances you will allow for that to happen. But the definitions, I think that's a barrier. We need to clearly define what is agritourism.'

The loss of prime agricultural land to developers was also considered a barrier. It was perceived to contribute to high land values, which may prevent potential operators entering agriculture and consequently agritourism.

Food distribution was highlighted as an important issue, particularly for local chefs and restaurants supporting regional produce. Both business operators and support service staff stated that lack of local food distribution systems to support local food consumption beyond the farmers markets was a limiting factor, as expressed by one restaurant operator:

'We are constantly trying to introduce more local produce to the restaurant. I feel we are the spokespeople for the local produce in the area but we are always experiencing hiccups trying to get local produce in.'

Solutions and opportunities

As in other case studies, improving skills was seen as important in supporting agritourism and food tourism in the region. Suggested learning processes included those that helped business operators understand the implications of starting a tourism operation, as well as improving marketing and business planning skills. It was also suggested that this was best undertaken through peer group processes where lessons learnt could be shared. The use of mentoring and support groups and taking a group of people through an exploration exercise was popular among the participants, based on the success of activities delivered by the Southern Cross University.

The next most referenced solution in this region was the need for better coordination and collaboration between stakeholders involved in agritourism and food tourism. The lack of a peak group and a strategic plan for agritourism and food tourism was mentioned as an issue for resolution to progress the sector.

Just as regulations were frequently seen as a large barrier to progressing agritourism and food tourism in the region, there were recommendations for more streamlined approval processes for agritourism and assistance from government to ease the frustrations associated with regulatory issues. Associated with this issue was the need to improve understanding of agritourism and food tourism, particularly among regulatory bodies. This included the suggestion of an agritourism policy within local government or other directives that encouraged agritourism and food tourism in the region. A support services participant observed:

'Because lots of the farm based stuff is dealt with on a local council basis, if there was an overarching directive or encouragement so council understood that it was an emerging industry it would be good'.

The need for action on developing adequate food distribution systems was also put forward as an important solution by participants in this region. A business operator summarised the issue and ideas for the way forward:

'Delivery of local produce is an issue! What is needed is an online registry of local growers to make it easier for food businesses to showcase local produce. There is some resistance from farmers to this suggestion—they don't want to go that one step further, perhaps a schedule is needed for farmers. Local produce is not cheaper, but customers will pay.'

Eastern Gippsland

Regional characteristics

Eastern Gippsland is a diverse region. It comprises snow-fields, wilderness, rainforests, beaches, industrialised areas and farmland. On the east coast of Victoria, Eastern Gippsland includes coastal areas and also stretches up to the alpine mountain area around Omeo. Regional characteristics considered important in terms of agritourism and food tourism are shown in Table 10.

Table 10: Eastern Gippsland regional characteristics

<p>Regional characteristics</p>	<p><i>Access</i> Centre of region around 200 km from Melbourne and around 400 km from Canberra. On the Melbourne to Sydney coast drive.</p> <p><i>Accommodation</i> A range of facilities from bed and breakfast to camping facilities, including some farmstays.</p> <p><i>Infrastructure and services</i> Strong transport and economic links to Melbourne.</p>
<p>Population</p>	<p>In 2006, the estimate resident population of the East Gippsland region was 104 036 people. The proportion who were aged 74 years and over was 5.2 per cent, with 22.2 per cent of the population aged 55 years and over. Younger people aged 15 to 24 years made up 13.3 per cent of the population (ABS 2008a). Although positive, the annual population growth of the East Gippsland region has fluctuated over the period 2002 to 2006, ranging from 2.7 per cent to 3.6 per cent, with an annual average increase of 3.2 per cent a year (ABS 2008a).</p>
<p>Agricultural information</p>	<p>Based on the 2006 Agricultural Census, there are 1945 agricultural businesses in the east Gippsland region (including fruit and grape producers), with a combined gross value of agricultural commodities produced of approximately \$442 million (ABS 2008b). There are 2794 people employed in the agriculture, forestry and fishing industries in the region (ABS 2008c).</p>
<p>Tourism profile</p>	<p>In 2007, \$453 million was spent by visitors in the region, with domestic overnight visitors accounting for 59 per cent of total spend. There were a total of 3.1 million visitors to the region, of which 68 per cent were domestic day visitors. There were 3.1 million nights spent in the region, with 92 per cent spent by domestic overnight visitors (Tourism Research Australia 2007). Reported in 2007, there were more than 4400 tourism-related businesses in the region; 47 per cent were non-employing businesses and 48 per cent were micro or small businesses (Tourism Research Australia 2007).</p>
<p>Lifestyle drawcards</p>	<p><i>Local produce</i> Gippsland is the centre of dairy production in Victoria. It also represents a range of farm produce, including fruit, vegetables, flowers, wine and livestock. The area has become renowned for its range of cheeses and other milk products promoted through the Gippsland Gourmet Country promotion. Fresh seafood is also harvested in the region.</p> <p><i>Consumption opportunities</i> There are numerous restaurants and cafes in the region. There is an active food and wine trail. 'Pick your own' fruits and berries experiences are available at various farms and co-ops.</p> <p><i>Recreation, attractions and activities</i> Recreational opportunities include houseboats for hire in the lake district, surfing and fishing activities from the 90 Mile Beach, the Croajingolong National Park, which is a World Biosphere Zone, snow and ski resorts in winter and trout fishing, camping areas and hiking and bushwalking. Gippsland has considerable natural attractions, from Wilsons Promontory</p>

	to the Gippsland Lakes, the country's biggest inland waterway, and the Alpine National Park.
	<p>Sources:</p> <p>www.gippslandgourmetcountry.com/home.htm.</p> <p>www.discovereastgippsland.com.au/foodwine.asp?print=1.</p> <p>www.sydney-australia.biz/victoria/gippsland/.</p> <p>www.egipps.vic.gov.au.</p>

Agritourism and food tourism business case studies

There is a variety of agritourism and food tourism business in Eastern Gippsland. The region includes a number of 'bed and breakfasts' on rural properties. There are also significant farm-gate sales and cellar doors. Food tourism is emerging in this part of Gippsland, with some exceptions such as restaurants, provedore shops and other outlets which are important in promoting local produce. The Boathouse restaurant in Lakes Entrance represent a flagship for this effort and the menu contains several dishes showcasing locally grown ingredients.

Examples of agritourism in the region include working farms that have diversified to allow tourists to experience or observe some form of agriculture, including staying on-farm. There are also a number of horticultural businesses that have opened their gates to direct customer sales. Another business type represented are those businesses that have been specifically established to tap into a higher-end market, including gourmet food and/or accommodation, often with a linkage to agricultural lifestyle and local produce. 'Pick your own' fruit experiences were less common with many producers citing concern over damage to fruit and fruit bearing plants.

The majority of business operators interviewed were operating as commercial farms, including a number of small-scale operations. Some operators have progressively become more involved in tourism sales as a means of expanding and diversifying income, often through attracting local interest and passing visitors, rather than large-scale investment or participation in multi-site packaged tourism experiences.

Increasing or maintaining income was the most often referenced motivation for being involved in agritourism and food tourism in the Eastern Gippsland region. Some farm business operators said that their agritourism income ranged from 5 per cent (a farm experience business) to 50 per cent (a farm accommodation and experience business) to 100 per cent (a farm-gate shop business) of total income. Farm-gate sales, especially in summer, can attract significant sales and better prices than wholesale.

The Twin Rivers Farm Fresh Food and Wine Trail, based around the towns of Buchan and Bruthen, was initiated in the late 1990s and includes a range of horticultural producers, a winery, cafés and recently a craft shop. Members report that getting recognition for the trail was hard initially and its success is largely based on members' efforts in promoting each other's businesses by word of mouth. There was a widespread belief that the trail was valuable for encouraging people to stay in the region another day.

The owners of Johnsonville Fruit Farm, who initiated the Twin Rivers trail, established their fruit orchard over 20 years ago. Over time they gradually transitioned from sending their fruit to city markets to selling the majority of it through their on-farm shop. They also make and sell their own

value-added products. The McConnell Berry Farm, on the trail, is open for sales direct to the public during harvest but has an emphasis on exporting their high-quality fruit. Le Café in Bruthen is also on the Twin Rivers Farm Fresh Food and Wine Trail and acts as a hub, actively cross-promoting other farms on the trail. The shop emphasises local ingredients, including those from the Twin Rivers trail.

Tambo Hydroponics, which is also on the trail, was established in 2008. They sell to the wholesale market, at the farm-gate and to a small number of local retailers and various farmers markets. Nicholson River Winery is another business on the Twin Rivers trail. Their main tourism activity is cellar door sales, and the bulk of their sales are either direct or through mail order. The winery was a venue for the Rotary-run (volunteer) festival 'Feast on East', which ran annually for three years.

While horticulture-related farms dominated agritourism and food tourism in Eastern Gippsland, some dairy and broad-acre farms are also represented. Warren Robotic Dairy is considered as somewhat of an agritourism and food tourism icon in the region. This was one of the first robotic dairies in Australia. Significant investment has gone into creating a visitor experience with a viewing room, dairy museum and a small auditorium for presentations.

Karoonda Park, based at Gelantipy, is a family-operated beef cattle farm on 526 hectares. About 30 years ago they diversified into providing farm experience and accommodation. The business accommodates up to 180 people in motel-style and dormitory accommodation. The venture attracts school groups, some corporate groups, backpackers, families and passers-by. They offer horse riding, river rafting, abseiling and rock climbing, and touring around the farm. Having acted as a venue for emergency accommodation during fires, this business demonstrates the utility of having such accommodation services located in rural communities.

Other momentum is towards the gourmet market. These businesses were more likely to be new, require substantial investment and marketing and obtain a large majority of income from non-primary production (i.e. from accommodation or restaurant meals).

The vineyard on Toms Cap Vineyard Retreat was established about 20 years ago. Since planting vines, it has progressively added buildings and established luxury accommodation. The property now includes a restaurant, cellar door outlet, chapel (for weddings), several cottages and a four-bedroom house. It provides accommodation to couples or large groups, often from Melbourne, and wedding parties, hosting around 35 weddings a year at the property.

As in other regions, restaurants, provedore shops and other outlets are important in promoting local produce. The Boathouse restaurant in Lakes Entrance represent a flagship for this effort and the menu contains several dishes showcasing locally grown ingredients.

Regional coordination of agritourism and food tourism

Most of the population lives by the coast and tourism is concentrated there. The Shire is 75 per cent public land so there is less opportunity for private tourism development than in some other areas. Eastern Gippsland is a geographically long and large area and this is perceived as a problem, especially for new operators who may be isolated and not know other operators. The large distances involved in travelling between farms for tourists in Gippsland was identified as an impediment to setting up co-ordinated farm-to-farm tour services. The strength of the region as a tourism destination is largely related to the nature-based assets, with food and wine an emerging strength (focus group). Participants in the region's focus group conveyed enthusiasm to further

develop the agritourism and food tourism product of the region and wanted to raise the profile of this aspect.

Whole of Gippsland-based initiatives that potentially interact with agritourism and food tourism in Eastern Gippsland include Gippsland Inspired, Destination Gippsland and Agribusiness Gippsland. Agribusiness Gippsland has invested in food processing and sees tourism as a part of the productive output of the region (focus group). Strategic planning for agritourism and food tourism in Eastern Gippsland has included the Eastern Gippsland Shire strategic tourism plan, which incorporates food and wine tourism, and, more recently, planning undertaken by the Eastern Gippsland Food and Wine Network.

The Eastern Gippsland Food and Wine Network is supported by the Victorian government and local government and the aim is to develop a brand for Eastern Gippsland and Wellington. The main drivers were to improve economic viability, increase supply chain logistics and increase networking across Gippsland producers in the Wellington and Eastern Gippsland shires. Creating a regional name for locally produced food is one of the key charters of the recently formed network, as well as building a culture of cuisine that is integrally linked with local produce. The food and wine network is looking at matching up sources of local food and an objective of the network is ‘taking the local product and lifting it up to the market’ (support services participant).

There are two farmers markets in the area at Metung and Bairnsdale, held on the first and second Saturdays of the month. Farmers markets are not as developed as in the other regions examined in this study.

Enablers of agritourism and food tourism

The timeline in Table 11 was constructed by focus group participants and outlines the key factors and activities that contributed to the development and progression of agritourism in the Gippsland region

Table 11: Timeline of agritourism activities in the Gippsland area

Date	Activities contributing towards agritourism and food tourism
1900s	Gippsland became a desirable holiday destination (because of trains).
1950s–60s	Latrobe playground—Lakes Entrance becomes a family destination.
Late 1970s	Host farms started (e.g. Karoonda Park).
1980s	West Gippsland—gourmet trail commenced (encouraging Melbourne day trippers). Late 80s—change in type of agriculture—opening opportunities—entrepreneurial.
Mid 1990s	Twin Rivers Food and Wine Trail commences. First farmers markets start. TV chefs show interest in the area.
2003	Strategic/planning processes for food tourism started, more culturally diverse demographic visiting.
2005	Feast on East event—encourages local participation in local food.
2007	Destination Gippsland.
2009	Eastern Gippsland Food and Wine Network.

In the 1920s and 30s, Gippsland was a top-end holiday destination, with one participant at the focus group noting:

'The high point of Gippsland tourism was after the trains in the 1880s came through this area, near the First World War. What took away tourism from this area was the development of the motor vehicle and the development of Mornington and all those areas on the coastal areas, because people had cars and now we're fighting back, but we're on a different front this time, because this time we can do it on product.'

Awareness of regional food and wine tourism started in the 1980s when some restaurants such as Bellview started using and promoting local food and wine.

'It was to start, it was consciousness—raising really. We had a very low base there and this is revolutionary. Fancy using local food and wine!'

Host farms also emerged in the 1980s, influenced by more disposable income and people wanting change (focus group).

Farmers markets were mentioned as an encouragement to agritourism and food tourism by nearly half of the interviewees in Eastern Gippsland. A support services participant observed:

'Another area of significant potential is the current move towards organic and farmers markets. It's good for people with small land holdings—or farmers who've retired and still want to do something—they form the backbone of farmers market. They only have to interact for ½ day a week. These are like an embryo—for micro-businesses to start from nothing.'

Also as in other areas, the benefit of farmers markets in attracting tourists to the region was recognized by another support services participant:

'Farmers markets are part of overall [tourism] offerings. It's attracting people in from 150kms away. For tourists, the markets are casual markets and there's also the health benefits. It's really positive. It's agritourism but without people having to come to the farm.'

Many people acknowledged the role of food and wine trails in enabling agritourism and food tourism in the region. The benefits of the existing trail in increasing visitors were described by a business operator:

'It has made a difference, I would say maybe a 25 per cent or 30 per cent increase [in visitors]. I remember the [hort produce] farm we originally had [on the trail]; he didn't want to join initially, but then he did and noticed a 10 per cent increase in the first year, then up by 50 to 70 per cent.'

Coordination to support agritourism and food tourism had come and gone in the region over the years and a number of interviewees suggested that dedicated support is needed in addition to volunteer effort to support agritourism and food tourism at the regional scale. At the local scale, informal networks and clustering were highly regarded in supporting agritourism and food tourism, including connections between restaurants/cafés/outlets and farms.

Barriers to agritourism and food tourism

As discussed by focus group members, Eastern Gippsland may not, as yet, have the critical mass of product to fully support demand for agritourism and food tourism experiences in the region. Some drawbacks observed in the region were a shortage of accommodation and a lack of drawcards. There was some sense that the region suffered from some immature product and operator 'burnout' (focus group).

Key issues for agritourism noted in this region included attracting sufficient labour and problems with regulations for development approvals, signage and zoning. There was some acknowledgement among local government of the hurdles that have to be overcome to support agritourism and food tourism activities on agricultural zoned land, with some plans in place looking at rezoning for tourism development.

Other regulatory issues included preventing sale of products not produced on-farm which may be needed to supplement farm produce, especially during drought years. Signage regulations were also noted as an issue for some operators.

Small business resourcing issues were also noted, with many of the operators struggling with the large capital outlay required and also needing to work off farm. As one business operator noted about a farm-gate horticultural business in the region:

'It's a two man operation but you can't get two wages out of it. So one of the couple has to go and earn the bread, and the other works on the business.'

This lack of resources and time affected the ability of business operators to tend the farm-gate sales point and issues with opening times were seen as a barrier to attracting tourism in the region.

One of the barriers to setting up farm experiences was public liability concerns. Safety audits and insurance were a constant concern to those businesses undertaking farm experiences, who commented that it severely effects what they can offer to tourists. Even with careful attention to safety, operators often needed a high level of public liability insurance to undertake such activities.

Another barrier was the minimal distribution channels for local products, which inhibits the ability to promote the region as a food area, with chefs and local food retailers needing to spend considerable time chasing the products: As one business operator commented:

'To use local products, there is a lot of planning involved.'

Participants in the focus group showed a great deal of interest in consumer demands and expectations, including past and future trends in visitation. However, a lack of data on the agritourism and food tourism industry in the area to back up the strategies was noted as a barrier.

The drought and hot conditions of recent years were also noted as a concern for primary producers. A number of horticulturalists had moved to shade-clothing crops and were concerned about future water supply and the impact of the expected extremes of weather conditions on fruit growth. As well, broad-scale catastrophic fire warnings issued in late 2009 were reported to be keeping tourists away from the area, even in parts of the region which were not at fire risk according to participants.

Solutions and opportunities

Participants observed that the Eastern Gippsland agritourism and food tourism experience is different to other models (e.g. Yarra Valley). The region offers a unique experience and hence needs adequate differentiation in tourism marketing (focus group). This includes changing perceptions of Eastern Gippsland so people understand the wide range of tourism experiences available in the region, rather than seeing Eastern Gippsland as a broadacre farming region alone (focus group).

Forward plans to progress agritourism and food tourism in Eastern Gippsland largely focused on expanding the experiences on offer, including more farm accommodation to allow interaction with locals and achieving critical mass (focus group). The need for more stand-out drawcards was also identified (focus group). Ideas for new agritourism and food tourism drawcards included creating forestry industry visitor attractions, further interpretation and education activities related to the vegetable industry and the development of a fishing industry interpretive centre at Lakes Entrance.

The desire to expand food tourism in the area was apparent and the benefits of this in the region are described by a support services participant:

'Tourism traditionally is about geography but in the last few years it's suffered from bushfires, floods, water problems etc. Putting everything into the 'natural' basket is a problem. So what we've been doing is increasing emphasis on food and wine and arts culture and heritage. These are less vulnerable to natural environment threats. Also tourists age 50 plus have large nest eggs and are spending lots of money. They want to have a nice meal, (visit a) winery, nice accommodation. We are attempting to increase the range of products, of locally produced products. Marketing in this sector (is) very high yielding—the baby boomers are what is wanted.'

Another innovative approach that is underway in the Yarram district, which adjoins the case study area, is a feasibility study for branding on a 30 km radius using the postcode as the logo. Associated with this is a planned marketing campaign on 'local food heroes', a weekend open farm scheme and produce days and the development of a community-based commercial kitchen where growers value-added products.

The need to improve the skills of agritourism operators was also noted by many as a requirement to move forward in the region, with suggestions that new entrants have the opportunity to attend 'starting out in tourism' training. Improving consistency in customer service was another skill area identified as an opportunity (focus group).

Participants also suggested a more client-oriented focus was needed, not just in this sector but across tourism. Efforts to better determine what Melbourne consumers want were recommended (focus group).

Improving coordination across the region was also frequently mentioned with the need to 'get beyond the owner-operator business to a cooperative approach, such as a tour bus taking people from site to site, instead of the onus being on individual businesses (focus group). This suggested coordination included the use of a cooperative overarching body for promotion, marketing and signage (focus group). The potential role of the Eastern Gippsland Food and Wine Network in creating a network across the region was seen as an important opportunity, as were the roles of informal networks in localities.

Orange

Regional characteristics

Orange is a provincial city situated in central New South Wales. It is located on the Mitchell Highway, 260 kilometres west of Sydney, at an altitude of 862 metres and has a population of 31 544 people. Key industries include agriculture, mining, health services and education. Based on existing boundaries for regional coordination of agritourism, the region for this study includes the Orange, Blaney and Cabonne council areas.

Orange is a well-known fruit growing district, and produces apples, pears, and many stone fruits such as cherries, peaches, apricots and plums. A large number of vineyards have been planted in the area for a rapidly expanding wine production industry. The growth of this wine industry, coupled with the further development of Orange as a gourmet food region, has ensured Orange's status as a popular tourist destination. Regional characteristics considered important in terms of agritourism and food tourism are described in Table 12.

Table 12: Orange regional characteristics

<p>Regional characteristics</p>	<p>Access From Sydney and Canberra, Orange is a 3.5 hour drive.</p> <p>Accommodation Bed and breakfast guesthouses, farm stays, camping and boutique hotels.</p> <p>Infrastructure and services Strong transport and economic links to Sydney and Canberra.</p> <p>Critical mass Diverse attractions that have broad appeal.</p>
<p>Population</p>	<p>The population of the Central NSW region has fluctuated over the past five years, with 2003 and 2004 having an overall decline of 0.3 per cent and 0.4 per cent, respectively (ABS 2008a). Although there has been an increase in 2005 and 2006 of 0.1 per cent and 0.5 per cent, respectively, the Central NSW region has had a negative annual average growth rate of 0.06 per cent a year since 2002 (ABS 2008a).</p> <p>The usual resident population of the Central NSW region in 2006 was 247 825 people. The proportion aged 74 years and over was 6.9 per cent, with 26.6 per cent of the population aged 55 years and over (ABS 2008a). Younger people aged 15 to 24 years made up 13.0 per cent of the population.</p>
<p>Agricultural information</p>	<p>Based on the 2006 Agricultural Census there are 9912 agricultural businesses in the Central NSW region (including fruit and grape producers), with a combined gross value of agricultural commodities produced of approximately \$1610 million (ABS 2008b). There are 13 968 people employed in the agriculture, forestry and fishing industries in the Central NSW region (ABS 2008c).</p>
<p>Tourism profile</p>	<p>In 2007, \$962 million was spent by visitors in the region, with domestic overnight visitors accounting for 60 per cent of total spend. There were a total of 4.5 million visitors to the region, of which 59 per cent were domestic day visitors. There were 5.6 million nights spent in the region, with 92 per cent by domestic overnight visitors. Visitors to Orange are 48 per cent Sydney, 31 per cent other NSW and 21 per cent other Australian (Sykes, pers comm. 2009). Visitation by tourists to the Orange region in 2009 was up 40 per cent from the previous year (Sykes, pers comm. 2009).</p>

	There were more than 6500 tourism-related businesses in the region; 44 per cent were non-employing businesses and 50 per cent were micro or small businesses (Tourism Research Australia 2007).
Lifestyle drawcards	<p><i>Local produce</i></p> <p>The Orange region has a long history of producing a wide range of agricultural products. Visitors can experience everything from ‘paddock to plate’, starting with the producer and farm-gate through to accessing boutique value-added products.</p> <p><i>Consumption opportunities</i></p> <p>Orange hosts an annual Food of the Orange District (FOOD) week, which is a chance for local producers to showcase their produce. Local produce including honey, jam, sauces and preserves. The Orange region includes vineyards planted above 600 metres in altitude within Blayney, Cabonne and Orange local government areas. A developing wine district, the first plantings were in the early 1980s, and now around 1350 hectares are under vine.</p> <p><i>Recreation, attractions and activities</i></p> <p>The region around Orange offers numerous recreational activities, including theatre, arts and museums. Activities include picnic races and various expos and shows. Farm gate tours are run during Food Week. Natural attractions include Mount Canobolas State Recreation Area, Lake Canobolas Reserve, Ophir Reserve and the Orange Botanic Gardens.</p>
	<p>Sources:</p> <p>www.orange.nsw.gov.au.</p> <p>http://en.wikipedia.org/wiki/Orange,_New_South_Wales - cite_note-ABS-0#cite_note-ABS-0.</p> <p>www.business.nsw.gov.au/community.</p> <p>www.tasteorange.com.au/news.htm.</p> <p>www.orangefoodweek.com.au/.</p> <p>www.orange-nsw.com/FoodWeek.html.</p>

Agritourism and food tourism businesses in the Orange region

For agritourism businesses in the Orange region, wanting to educate people about farming and the rural lifestyle and wanting to increase or maintain income were the most frequently cited motivations for being involved in agritourism. The lifestyle opportunities associated with agritourism, including working from home instead of having to look for off-farm income and taking on a rewarding challenge, were also important.

Impact of the recent drought years provided a context for agritourism, with a number of business operators mentioning that agritourism provided useful income during that period and an opportunity for visitors to experience the farm lifestyle and workload during drought. In other cases, drought had meant that the agritourism venture had no product or service to sell.

Decline in the apple and other fruit markets in the 1980s and 1990s also provides an important contextual influence on the uptake of agritourism and food tourism in the area.

Hillside Fruit Market is one of the early farm produce shopfronts in the area, first established in the late 1980s in response to poor fruit wholesale prices. Purchasing a shop on the highway was a key

part of the business' strategy to increase income from its orchards. It now sells 100 per cent of produce through direct sales, including a range of jams and condiments.

Borrodell on the Mount represents one of many wineries in the region. Partially transitioning from apples and cherries around 20 years ago in response to a decline in this industry, this business includes accommodation and a restaurant/function centre, along with the cellar door.

There is growth in the promotion of food from the Orange region, with a number of provedore shops starting up recently as well as gourmet shops that have been around longer. Totally Local and Slice of Orange are two recently established businesses that focus on produce from the immediate area. They both use the '100 mile diet' concept. Totally Local calls itself an 'everyday farmers market'. As well as a retail shop, it runs a refrigerated transport company, distributing local produce. Slice of Orange provides a retail outlet for around 60 businesses.

Pick-your-own (PYO) experiences are common in the Orange region. Providing PYO experiences was seen as a profitable exercise, with one grower saying they could earn up to \$30 000 a year from one hectare. PYO cherries and berries and some other crops are available throughout the area, with most PYO fruit available in summer.

There are a limited number of farmstays in the area. Dairy Park is a working farm where visitors (mostly families), join in with the farm work opportunistically. Owners were strongly motivated to share the farm lifestyle and information about sustainable farming and food production with visitors.

Although farmstays in the area offer both traditional and 'novel' farm interactions, farm experiences are relatively undeveloped in the region. Cargo Wines, as well as a cellar door and coffee shop, offers farm experiences such as involvement in planting and vineyard management and PYO. It also offers on-farm camping. All wine sales are direct, including supply to a number of restaurants.

The Black Sheep Inn, a unique farmstay experience in a shearing shed fitted for luxury accommodation, represents a business supported by two generations of the same family and an opportunity to provide a lifestyle and income for adult children returning home.

Regional coordination of agritourism and food tourism

Orange has had around 20 years lead time to the current status of agritourism and food tourism. In this time there have been active moves, particularly by local government, to draw people to the area both for tourism and for encouraging sustainable population growth in the area.

Led largely by the vigneron community, with support from the Orange City Council and other community- and industry-based organisations, the agritourism experience has widened from a sophisticated wine experience to one that also includes a range of local food products.

Taste Orange (formerly Brand Orange) is an overarching organisation supporting regional and community development, regional produce and tourism in the Orange area. It has up to 300 members from food and wine businesses, the accommodation sector and, increasingly, from other businesses that have a vested interest in tourism. The organisation coordinates four festivals in Orange and one in Sydney—Taste Orange at Bondi—and also produce the Orange region tourist guide. Food and wine tourism are central to tourism marketing and promotion in the region.

Objectives of Taste Orange include working with producers, the consumer community, media and government to create awareness and demand, consumer loyalty and community loyalty (K Currie [Taste Orange] 2009 pers. comm., May).

Largely facilitated through the forum of Taste Orange, a wide range of stakeholders, including agricultural industry representatives, are involved in activities to support agritourism and food tourism. Government agencies and their representatives appeared to be engaged in the agritourism sector to a greater extent than like agencies in other case study regions. Examples of this include the council's involvement in agritourism through their regional development and tourism objectives and the NSW Department of Primary Industries (now NSW Department of Industry and Investment) broadening its base to include regional development, including a partnership with Tourism NSW.

Major tourism committees and organisations collaborating in the Orange region, particularly on food tourism matters, include Food Of the Orange District (FOOD) Week, Taste Orange, Central NSW Tourism, Tourism NSW, Orange City Council Tourism and Promotion, Orange Regional Vignerons Association and the Orange Tourism Partnership Program.

An important characteristic of coordination in Orange was the empirical approach initiated by the Orange City Council, specifically by Stephen Sykes, a staff member with social research skills. The approach included significant research to better understand the tourism market for the region. There was research funding received from See Australia and much of the research was community funded (S Sykes [Orange Council] 2009 pers. comm., September). The following observation about how strategic approaches at the regional scale were mirrored by industry was made at the focus group:

'I think Stephen Sykes brought quite an empirical approach to working out tourism, but at the same time...others in council and in community ...adopted more of an empirical approach to the local industry...whereas you find other communities where locally there might not have been that same sort of businesslike empirical approach.'

The focus on market segmentation that resulted from this work was picked up by regional tourism operators. A comment on market segmentation from the focus group:

'People latched on to that because here's a bit of science—we're the 'Pompadour' market or we're the 'Labradoodle' market. So that was going on at a regional approach, but the same focus was applied locally too, in a more concentrated way, to the thinking about what's their market, how big is it, what's it worth, how do we approach it. I think that's something that sets Orange apart from a lot of other communities.'

An important outcome of the market segmentation research was the development of events that targeted the different segmentations (S Sykes [Orange Council] 2009 pers. comm., September).

Enablers of agritourism and food tourism

The timeline in Table 13 was constructed by focus group participants and outlines the key factors and activities that contributed to the development and progression of agritourism in the Orange region.

Table 13: Timeline of agritourism activities in the Orange area

Date	Activities contributing towards agritourism and food tourism
1950s	Australian National field days, Australia’s oldest agricultural field day. This event has attracted a large number of visitors to the region since the 1950s.
1970s	The pioneering of farm gate sales of orchard produce. Chef Michael Manners sources produce from the Orange area for his restaurant in Blackheath.
1980s	Decline of apple industry led many local orchardists to diversify their production and look for new opportunities in terms of commodities produced and how they marketed these commodities. The Orange wine region developed in the late 1980s. Cool climate wine at altitude combined with unique geology (calcareous limestone) based soils. Late 80s—early pioneer wineries such as Brangayne and Bloodwood. First commercial snail farm in Australia.
1990s	Food of Orange District (FOOD) established. Orange Region Vignerons Association established. Relocation of NSW Department of Primary Industries to Orange. Michael Manners’ Selkirks restaurant.
2000s	Farmers market commences. Local government investment in the collection of tourist visitor data. Brand Orange organisation formed. Further developments, such as Borenore trail.

All interviewees commented on the value of the regional coordination of tourism being undertaken, particularly the marketing and networking benefits. A typical comment from one of the business operators interviewed:

‘Taste Orange has been a great support. They are doing it better than a lot of other food regions in Australia. Whenever they have events we have ads and coincide tastings etc. Their support is invaluable. We couldn’t do it on our own and because of what Taste Orange has done, people know about produce from Orange.’

The strategic planning undertaken in this region, although not widely referenced by business operators, appears to be an important enabler. Building on the research that identified target markets and their core needs, an intensive planning exercise took place—commencing in 2003—under the auspices of Taste Orange. This process identified stakeholders for further engagement and developed principles for tourism in the region, including having a consistent message, a single point of contact and being industry based.

Community involvement in supporting agritourism and food tourism appeared to be well developed. As determined from the market research, tourists want to believe that the local community is fully behind the event (S Sykes [Orange Council] 2009 pers. comm., September), so ensuring community involvement was a key strategy.

Business operators in Orange were demonstrably more tuned in to understanding the market than in other regions. They understood market segmentation and frequently discussed their businesses in the context of this.

Orange participants also emphasised an interest in and commitment to communicating with consumers to improve their ability to provide solutions for them. One business operator said of the clientele to their boutique farm accommodation:

'[They are] time poor, cash rich, so very demanding, So if you really know what you're doing, it starts with the booking process, knowing what the customer wants and providing the weekend solution, so the solutions with the restaurants, with the winery.'

Informal, 'loose' networks of support were clearly evident among agritourism and food tourism operators, with a high degree of collective action within the community from those involved in agritourism activities. A number of interviewees observed that food and wine tourism operators in the region are passionate, energetic and innovative. There was also evidence of the preparedness of industry to invest; for example, ORVA (Orange Region Vigneron Association) who were a sponsor of Taste Orange.

Establishment of short supply chains was well progressed in this region, with many of the farm-gate tourism operators selling most of their produce direct. These direct sales included from cellar doors or farm-gates, at farmers markets and to restaurants and the local food outlets mentioned previously. A unique example of direct sales was one Orange region farmstay that delivered fresh meat direct to previous and current farmstay clients in Sydney and Melbourne.

Chefs and restaurants and their use and promotion of local food were also considered important enablers of agritourism and food tourism in the region.

Barriers to agritourism and food tourism

Demonstrating the maturity of this region with regard to agritourism, the most frequently referenced barriers were those related to small business resourcing issues. This largely related to issues about raising capital to take the venture to the next stage. These issues are common among the family farm sector and should not be taken to imply anything particular to this region, except that in comparison to some other regions (e.g. Northern Rivers), there may be less access to capital.

Regulations were the next most frequently referenced barriers. This included one business operator who was unable to expand the business to include farm visits and experiences because development approvals would likely require a road upgrade. As in other areas, having to cater for disabled visitors was seen as a difficult limitation to overcome in the farm setting. Another business operator commented on the New South Wales liquor licensing regulations, which they advised prohibited sale of wines not produced on the property. This essentially meant that in drought years when no wine was produced from the farm, the business operator had to close the cellar door.

Signage issues were mentioned but there appeared to be less concern than in other regions.

Getting adequately skilled labour was also mentioned as a barrier, although Orange has an established backpacker migration. Nevertheless, improved regional coordination of labour was mentioned. On attracting backpackers to the area, one business operator noted:

'There is the risk of overselling ourselves and not delivering. The backpackers are all in town at the moment and the cherries aren't ready.'

Skills and perception of skills was noted by some as an issue to be overcome, but not as a serious barrier to progressing agritourism, with interviewees suggesting that generally many of the business operators in the area already possessed relevant skills.

It is worth noting the barriers common to other areas that did not arise from interviews in the Orange region, including misunderstanding of the agritourism sector, lack of support from the tourism industry and involvement of farmers, with these issues effectively being dealt with by the process driven by the Orange Council and Taste Orange and other stakeholders.

Solutions and opportunities

Stakeholders communicated that they believed there was a high degree of potential to further develop agritourism within the region, especially in the areas of farm stays and farm experiences.

Whilst agritourism and particularly food tourism was well developed in the region, participants saw the value in building on this through the development of an agritourism strategy at the local level, linking products to build experiences across the region. They also felt that more forward planning was necessary including developing a model of agritourism that fits what the industry will be in the future. Participants also noted that given that Orange appears to be on an upward trend in terms of tourism, the region needs to be prepared for changes through lessons learnt from other regions that are in decline or have suffered downturns. Also mentioned was the need to develop a strategy to attract more international tourists as well as developing and promoting links between high-quality food and health.

Opportunities to advance agritourism and food tourism in the region included providing more opportunities for operators to learn about agritourism. This included providing information and education for new businesses and further developing processes to share knowledge and expertise amongst operators. The need to assist local farmers in realising their potential to diversify their rural business into the agritourism industry was also observed.

Other comments related to ensuring the provision of consistent service across the areas such as developing strategies to ensure better provision of services on weekends (specifically Sundays) and public holidays, such as having food venues open on Sunday night.

Tropical North Queensland

Regional characteristics

For the purposes of this project, the area of main focus is concentrated within a three-hour drive radius of Cairns. Tropical North Queensland has a diverse range of climates, soil types and environments within close proximity to Cairns. Producers vary from large-scale commodity producers to small niche producers. There are approximately 130 different crops, many of which are value added and distributed via a growing number of agritourism experiences and newly established 'farm gate markets'. Regional characteristics considered important in terms of agritourism and food tourism are described in Table 14.

Table 14: Tropical North Queensland regional characteristics

<p>Regional characteristics</p>	<p><i>Access</i> Within three hours of Cairns.</p> <p><i>Accommodation</i> Farmstay, bed and breakfast to five star international hotels.</p> <p><i>Infrastructure and services</i> Inbound international and domestic flights daily into Cairns. Rail and coach transport.</p> <p><i>Critical mass</i> Diverse attractions from reef, rainforest and tropical food experiences.</p>
<p>Population</p>	<p>The usual resident population of the Tropical North (or Far North ABS Statistical Division) was 231 049 people. The proportion aged 74 years and over was 4.3 per cent, with 21.3 per cent of the population aged 55 years and over. Younger people aged 15 to 24 years made up 12.4 per cent of the population (ABS 2008a). The annual population growth of the Far North has fluctuated over the period 2002 to 2006, ranging from -2.4 per cent to 6.7 per cent, but was positive overall, with an annual average increase of 2.0 per cent a year (ABS 2008a).</p>
<p>Agricultural information</p>	<p>Based on the 2006 Agricultural Census there are 3185 agricultural businesses in the Far North (including fruit and grape producers), with a combined gross value of agricultural commodities produced of approximately \$953 million (ABS 2008b). There are 6294 people employed in the agriculture, forestry and fishing industry in the Far North (ABS 2008c).</p>
<p>Tourism profile</p>	<p>In 2007, \$2.8 billion was spent by visitors in the region, with domestic overnight visitors accounting for 55 per cent of total spend. There were a total of 4.2 million visitors to the region, of which 45 per cent were domestic day visitors, 14.8 million nights were spent in the region, with 54 per cent spent by domestic overnight visitors (Tourism Research Australia 2007).</p> <p>There were more than 7100 tourism-related businesses in the region, of which 47 per cent were non-employing businesses and 44 were micro or small businesses (Tourism Research Australia 2007).</p>
<p>Lifestyle drawcards</p>	<p><i>Local produce</i> Traditional beef and dairy farms exist alongside significant value adding operations, including cheese manufacturing, chocolate, yoghurt and other specialty products. The region also has Queensland's first fully robotic dairy. Additionally, an emerging cluster of biodynamic and organic beef and dairy producers is collaborating; with a number selling direct to consumers in addition to farm-gate markets. The Tablelands (Atherton) Regional Council and Cassowary Coast Regional Council areas are the centres of food and agritourism activities and combine with nature-based tourism experiences.</p> <p><i>Consumption opportunities</i> There are established tropical food and wine trails that feature an extremely varied range of produce, especially exotic fruit. A number of local restaurants throughout the region also supply regional produce.</p> <p><i>Recreation activities and attractions</i> The region offers a range of diverse lifestyle, adventure, nature-based and agritourism experiences. The Wet Tropics house 10 major visitor sites: Mossman Gorge, Lake Barrine, the Crater, Barron Falls, Murrudja, Murray Falls, Henrietta Creek, Goldsborough Valley, Big Crystal Creek and Davies Creek.</p>
<p>Sources</p>	<p>Queensland Government Department of Infrastructure and Planning, 2008, <i>Far North</i></p>

	<p><i>Queensland Draft Regional Plan 2025</i>, Cairns.</p> <p>Tourism Queensland, 2008, Tropical North Queensland Regional Snapshot [Electronic Version], 3. Retrieved 06 January from: www.tq.com.au/destinations/tropical-north-queensland/research/research_home.cfm.</p> <p>Queensland Department of Tourism Fair Trading and Wine Industry Development, 2006, Queensland Tourism Strategy.</p> <p>Tourism Queensland, 2007, <i>Destination Management Plan for Tourism in Tropical North Queensland 2007–2010</i>, Cairns.</p>
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Agritourism and food tourism business case studies

Operators in the Tropical North Queensland region were motivated by the desire to diversify their business for increased income, or as a risk management strategy to withstand cyclones or other weather events.

The desire to respond to the public interest in knowing more about their food and become educators in their role was also a motivator for several operators in the region and was noted by a business operator:

‘Not a tour—an adventure! Specially for kids, can get them really involved—pick a banana off a tree and give it to them they will never forget it. Motivation is to get people to understand it all as well.’

The following synopsis represents a few of the agritourism businesses visited in Tropical North Queensland. There are also numerous bed and breakfast enterprises and more farm-based experiences, such as horse-riding, that were not covered during the field visits.

There are several businesses in the Mission Beach region which offer farm-gate sales, one of which is Quandong Farm lettuce and herbs. They offer farm-gate sales and also provide lettuces and herbs to several local restaurants and small supermarkets.

Following deregulation, several dairies in the Atherton Tablelands region developed their businesses to add value to their products. Mungalli Creek Biodynamic Dairy produces a wide range of yoghurts, cheeses and milk. Visitors can view the cheese and yoghurts being made while dining in the tea rooms. The operators also sell their produce nationally through supermarkets in Queensland, Victoria and South Australia. The Mugalli Dairy shop also features a range of products from other local artisan producers.

Gallos Dairyland is a family-owned business which, like Mungalli Creek Biodynamic Dairy, branched into value adding after dairy deregulation. Gallos produce their own range of cheeses and chocolates, cater for functions and provide meals. Visitors may also participate in a self-guided tour of the dairy and view the cheese-making process through viewing panels.

Tarzali Lakes Aquaculture Farm and Experiences use products from both Gallos Dairyland and Mungalli Creek Biodynamic Dairy in their range of gourmet value-added smoked meat and fish products which they sell at their on-farm kiosk and through wholesale markets. Tarzali Lakes

opened for business in 1996, and, in addition to their smoke house products, offer a wide range of experiences, including fishing, camping and platypus tours. The farm also exports live eels to Asia.

Rainforest Bounty is one of the newer businesses in the region, which makes tropical fruit products such as chutneys and sauces. Rainforest Bounty products contain both native and exotic fruits, and are sold through local markets and some local supermarkets. The business operators plan to open a cooking school in 2010 to showcase tropical fruits and their range of products.

Fruit Forest Farm is a new business opening near Tully on the Cassowary Coast which will also showcase a range of tropical fruits. The owner intends to offer tastings of his wide range of tropical fruits as part of a forest adventure tour.

While its key business is high-quality spirits, Mt Uncle Distillery on the Atherton Tablelands is the only North Queensland distillery and has a wide range of award-winning liqueurs. The distillery offers a wide range of product tasting, from its liqueurs to a range of over 50 teas. Guided tours of the distillery are also available and the café/restaurant is open for lunch and morning and afternoon tea. Nerada Tea is one of Australia's largest tea growers. Nerada's tea centre near Malanda offers a range of products for purchase, as well as factory tours and tea rooms.

Jacques Coffee is one of the older, more established businesses and has an established coffee plantation and café. Like many businesses in the region it is supported by, and also sells the products of other operators. It also offers ultralight flights.

Regional coordination of agritourism and food tourism

There had been some formal initiatives to develop agritourism in this region. Recent support from Advance Cairns, the peak economic body in Cairns, was mentioned as playing a role in regional development of the industry. There were also a few references to local councils in the region becoming more supportive recently, with attempts in some municipalities to overcome traditional barriers as mentioned by a support services participant:

'One of the things that will happen, all councils are re-doing their development plans for their council areas and I think given the renewed interest in farm and tropical foods tourism hopefully there will be some changes made in the council planning Acts that will enable more tourism, probably the best strategic way we can move.'

A group of food industry leaders formed Australian Tropical Foods to create awareness of the local produce. This formation presented opportunities for food tourism and the Taste of the Tropics Food Trails were developed in 2001. This allowed farmers to diversify and 'test' their value-added products, open their farm, and integrate with the tourism industry.

Informal clustering and some formal marketing of the Tropical North Queensland tourism experiences was considered important in raising the profile of the region. Most of the case study businesses that were visited stocked and sold products from other local agritourism operators. Several also used other operators' product in developing their own—such as Tarzali Lakes, who used cheese and other dairy products from Gallos Dairyland and Mungalli Biodynamic Dairy in some of its specialty meat products. Brochures with maps of the region, paid for by the local businesses included local agritourism businesses.

Training was linked to networking in this case study. Researchers from Southern Cross University had delivered a series of workshops with operators in the region, and these were widely praised as being beneficial in both helping to develop informal operator networks and helping farmers considering diversifying into agritourism to assess their readiness.

There were also dedicated staff and businesses that had developed more formal linkages between businesses, such as Food Trail Tours, which offer round trips from Cairns to several agritourism and food tourism businesses of the region. The Australian Tropical Food website also offers self-guided food trails of the Cassowary Coast, Coral Coast, Mountain Tablelands, Savannah Tablelands and rainforest. The Canecutter Way is another self-guided tour that includes a few agritourism businesses.

Enablers of agritourism and food tourism

The timeline in Table 15 was developed through the agritourism workshop held in Cairns and describes key factors and activities that contributed to the initiation and development of agritourism in the Tropical North Queensland (TNQ) region. These factors are further explored below.

Table 15: Timeline of agritourism activities in Tropical North Queensland

Date	Activities contributing towards agritourism and food tourism
1990	Opening of Skyrail.
1998–1999	Tobacco deregulation (\$\$ for diversification).
1999–present	Various state government programs such as the Queensland Industry Development Scheme and the Regional Business Development Scheme supporting the development of food manufacturers and food tourism projects.
2000	Dairy deregulation (support for diversification). Cairns Regional Economic Development Corporation (CREDC) recognising agritourism/food in economic development plans. Push for interpretive experiences. Food tourism projects such as Skybury Coffee House and Gallos Dairyland.
2001	Australian Tropical Food cluster developed—to create awareness of the food industry in TNQ Initiation of Agri-Food Tourism with the Taste of the Tropics Food Trails—included agriculture, food manufacturers, producers, restaurants and retailers of local food.
2002	Food tourism identified as a key area for development and grants made available for wineries.
2003	Sugar industry restructure.
2005	James Cook University—Cooperative Research Centre Farm and Country Tourism Workshops and Tool Kit delivered through five regional areas.
2006	Department of Primary Industries and Fisheries, Department of Employment, Economic Development and Innovation and Australian Tropical Foods initiated a Food Forum to bring together drivers to propel agrifood tourism onwards. This forum was held the day before Cyclone Larry. Cyclone Larry—infrastructure decreased and re-evaluation lost momentum.
2008–2009	Department of Agriculture Fisheries & Forestry support to brand seafood as a pilot project. Queensland Seafood industry association coordinated by Australian Tropical Foods.
2008	Queensland Food Strategy launched.

2009	Tropical Food Tourism Forum
2009	Agritourism included in the Regional Strategic Plan 2031.
2009	Farm-gate market started in Cairns
2009	Advance Cairns/Southern Cross University tourism development.
2010	<i>TQUAL Grants</i> project to develop and position TNQ food industry as an agritourism destination, initiated by Australian Tropical Foods through Advance Cairns.

Industry de-regulation had directly and indirectly influenced the establishment of agritourism businesses in the area. Farms had become available on the market following large numbers of farm exits, and some entry-level farmers had bought land at that time to start agritourism ventures or alternative agricultural enterprises which offer the opportunity for diversification. In several of the case studies, diversification into developing value-added milk products had occurred resulting from dairy deregulation.

There was also a push from the tourist industry to start developing alternative tourism experiences in the region. The Cassowary Coast Council, which fell within the study area, also considered agritourism as a priority (Lawler, S, pers comm 2009).

In some cases agritourism in the region had also been enabled through access to advice and funding. Interviewed participants of the training delivered by Southern Cross University felt the training had played a key role in helping to develop their individual businesses and to develop useful networks.

Funding delivered through both state and federal government programs was also identified as important in developing regional agritourism, and was pivotal in the establishment of Australian Tropical Foods.

Barriers to agritourism and food tourism

The main barrier noted in this case study region related to issues with regulations. These included a perception of difficult to understand approval processes and an unnecessary number of approval processes for development associated with agritourism. Comments were also made about inflexible application of regulations with few staff available to assist and expensive and time-consuming approval processes, which is particularly hard on small operators with few resources.

Participants communicated that regulations were influenced by a lack of understanding of what agritourism is. They also commented that there is little encouragement and support in developing it within the region. Comments were also made about inconsistencies in approval processes, with local government, state government, and food-based regulations being based on large-scale manufacturing plants which are unsuitable for small value-adding operations.

Problems with signage approval, in some municipalities more than others (the region spanned several council regions), were also considered significant barriers.

Climate and extreme weather events were seen as a barrier to agritourism in the tropical north. There were numerous references to Cyclone Larry, and its impact on agricultural enterprises in the

region. Operators and support services staff alike commented that the cyclone had interrupted the development of agritourism in the region as people recovered from the cyclone. Even without extreme events like the cyclone, the weather affected the availability of agritourism products. This was commented on by one business operator:

'[A] key barrier is having enough access to milk and also seasonal fluctuations which also affect access to milk— if there isn't much grass the cattle don't produce enough milk and if there is too much rain the grass goes rank and loses nutritional value. Can't irrigate, too undulating. The weather can also reduce access for tourists to get to the farm.'

In a more general sense, participants felt that the public perception of the extreme weather, as well as the undesirability of the hot wet season in north Queensland, acts as a barrier for tourists.

Farmers' inexperience and perceived lack of skills were also considered key barriers to the expansion and profitability of agritourism and food tourism in the region. There were numerous references to the need to train farmers in delivery of professional, consistent customer service and other relevant skills to improve the viability of agritourism in the region, as noted by a support services participant:

'Farmers need to know about meeting the needs of overseas guests, greeting people, marketing, knowledge of the tourism industry, not just the agricultural industry. (They need to) understand cultural diversity in tourism and be nice to people.'

Focus group participants also mentioned that while seed funding had been beneficial, a more consistent nature of support to agritourism and food tourism businesses could improve regional outcomes.

Solutions and opportunities

Participants felt that there was an opportunity for longer-term resourcing to play a role in formal coordination and support of an agritourism network. Although support for certain projects, such as the set up of the food trail network, had been accessed in the past, focus group participants felt that consistent support and facilitation would be useful in assisting business start up and marketing for brand development.

Participants discussed the frustrations with the innumerable approvals required for continued diversification of their farm enterprises, and suggested that a one-stop shop for development of an agritourism business needed to be developed and made available to farmers. In order to develop agritourism enterprises, participants felt it would be important for an inclusive definition of agritourism to be developed, which would also cover aspects of on-farm ecotourism experiences.

Training for farmers setting up as tourism ventures was also considered a good opportunity, with suggestions made that such a training and support role as provided by Southern Cross University should continue. This model may also be applicable in other settings; however, it was noted that any training needs to be tailored to the needs of busy farmers and conducted during low-activity periods.

Tamar valley

Regional characteristics

The Tamar Valley is located in the centre of Northern Tasmania, with Launceston at the southern end of the valley and Bass Strait at the northern end, some 40 kilometres away. The Tamar River is an estuary and can be navigated along its entire length. The North Esk and South Esk rivers flow into the Tamar River at Launceston. The Tamar Valley is made up of small villages and towns alongside the Tamar River. Many of the villages also have their own guides and walking trails.

The East and West Tamar highways offer one of Tasmania's great road trips, passing through fishing villages, historic settlements, holiday towns, dense rainforest and gold mining country. Both the west and east give access to north coast beaches. The East Tamar is also a gateway to the North East Touring Route. Regional characteristics considered important in terms of agritourism and food tourism are outlined in Table 16.

Table 16: Tamar Valley regional characteristics

Regional characteristics	<p><i>Access</i></p> <p>20-minute drive from Launceston.</p> <p><i>Accommodation</i></p> <p>Bed and breakfast to camping facilities.</p> <p><i>Infrastructure and services</i></p> <p>Strong transport and economic links to Launceston.</p>
Population	<p>In 2006, the usual resident population of the Tamar Valley region was 103 325 people. The proportion aged 74 years and over was 7.2 per cent, with 26 per cent of the population aged 55 years and over. Younger people aged 15 to 24 years made up 14.2 per cent of the population (ABS 2008a).</p> <p>Although positive, the annual population growth of the Tamar Valley region has followed a downwards trend over the period 2002 to 2006, from 1.5 per cent to 0.7 per cent with an average rate of 1.1 per cent (ABS 2008a).</p>
Agricultural information	<p>Based on the 2006 Agricultural Census there are 298 agricultural businesses in the Tamar Valley (including fruit and grape producers), with a combined gross value of agricultural commodities produced of approximately \$23 million (ABS 2008b). There are 936 people employed in the agriculture, forestry and fishing industries in the Tamar Valley.</p>
Tourism profile	<p>In 2007, \$540 million was spent by visitors in the region, with domestic overnight visitors accounting for 63 per cent of total spend. There was a total of 1.8 million visitors to the region, of which 62 per cent were domestic day visitors. There were 2.5 million nights spent in the region, with 78 per cent spent by domestic overnight visitors. There were more than 2600 tourism-related businesses in the region; 47 per cent were non-employing businesses and 44 per cent were micro or small businesses (Tourism Research Australia 2007).</p>
Lifestyle drawcards	<p><i>Local produce</i></p> <p>Fresh produce consisting of fruits and vegetables, dairy products, trout, salmon and wine.</p> <p><i>Consumption opportunities</i></p> <p>The Tamar Valley Wine Route has 24 cellar doors and offers dining experiences from fine dining to a light lunch or local cheese plate. Visitors can pick their own fresh fruit and berries from orchards in the valley.</p>

	<p><i>Recreation, attractions and activities</i></p> <p>Recreational activities include trout fishing and horse-riding, beach activities, trail walks through temperate rainforest, cable hang-gliding and mountain bike trails at Trevallyn State Reserve and rock climbing, abseiling and kayaking in the Cataract Gorge. There are several heritage walks and drives, as well as markets, museums, art galleries and numerous festivals and events. Natural attractions include the Tamar River, the Tamar Valley Wetlands, a wildlife park and fishing lake with a large collection of native and exotic animals, and resident seal and penguin colonies.</p>
Sources	<p>www.touringtasmania.info/tamar_valley.htm.</p> <p>www.ltv Tasmania.com.au/content/view/85/87/.</p> <p>http://en.wikipedia.org/wiki/Tamar_Valley,_Tasmania.</p> <p>www.tasmania.visitorsbureau.com.au/region6.ht.</p>

Agritourism and food tourism businesses in the Tamar Valley

Agritourism operators in the Tamar Valley were motivated to undertake agritourism and food tourism for various reasons, but a key theme was lifestyle. Operators interviewed mentioned that lifestyle was important, for both themselves and their community. Operators had a personal interest that they were pursuing, or in one case, wanted the opportunity to provide cheap fresh produce to the local community.

Several operators also mentioned that agritourism provided an opportunity for them to ease into retirement, or to provide an opportunity for their children to be involved in the farm prior to retirement. The following synopsis represents a few of the agritourism and food tourism businesses that in the Tamar Valley.

Wineries make up the majority of agritourism experiences in the region, one of which is Moores Hill Winery on the Tamar Valley Wine Route. The vineyard was established in the late 1990s, but changed ownership in 2007. The new owners hope to expand into food eventually, but are currently focusing on increasing recognition of their brand. The winery is known for its high quality riesling.

Also along the Tamar Valley Wine Route is Lavender House, which started in 1991 and originally sold lavender bags and a range of skincare products. The proprietors have subsequently expanded the scale of their operation and their range of products. The Lavender Farm now includes a tea room and shop, and will soon have public viewing available at its new factory.

Awareness of the farm-gate opportunities in the Tamar region and elsewhere in Tasmania may be lifted by the new *Farmgate Guide* that was released in December 2009. Avemore Farm is advertised in the guide and is a large-scale blueberry and cherry farm offering farm-gate sales. The majority of its produce is sold on the wholesale market and it employs around 20 pickers during harvest season.

Close to Launceston, East Tamar Cherries also sell farm-gate fruit, but do not advertise in the *Farm-gate Guide*. This business fills a niche in producing organic fruit, and also sells to some small supermarkets in Launceston.

Located within the suburbs of Launceston, Old Mac Farm provides a range of experiences and produce. Its main product is fresh strawberries and the operators also sell several condiments

carrying the Old Mac brand. The farm also offers trail riding, fishing, canoeing and camping experiences.

Slightly off the Tamar Valley Wine Route is 21 Degrees South Salmon and Ginseng Farm. This business opened in 2005 with a fish farm and small café. The operators also produce ginseng products and provide an ecotourism experience for their guests.

A sign at 21 Degrees South Salmon and Ginseng Farm advertises another popular and nearby attraction—the Honey Farm shop and café. The Honey Farm started in 2000 and is a family-owned and operated business. The Honey Farm offers a range of experiences and products, including a museum and a viewable hive with educational signage. It also runs tours for school groups, as well as customers. The Honey Farm operators have constantly expanded their product range and stock numerous consumable products, including a wide variety of honey, honey-based ice-cream and nougat. The Honey Farm also stocks a cosmetic range and products for children. The majority of the honey is locally sourced.

One of the older family-run establishments in the region is Christmas Hills Raspberry Farm and Restaurant. The shop sells a range of raspberry products, including condiments and personal treatments, as well as fresh raspberries, and the restaurant menu features a range of raspberry dishes.

Regional coordination of agritourism and food tourism

The coordination of the Tamar Valley Wine Route was considered highly successful by participants and is an excellent example of grower-driven coordination. Participants in the focus group explained that the wine route had been initiated by Andrew Pirie, of Pipers Brook Vineyard, following his arrival in the region in 1974. According to focus group participants, Mr Pirie always had a vision for a wine route and passionately pursued this agenda to have the Tamar Valley Wine Route established.

Features of the wine route include strong branding and excellent signage. The growers in the route also have a coordinated purchasing system, where customers are offered the opportunity to have all their wine purchases packaged and shipped at the last winery they visit.

The one key criticism of the route is that it is only a wine route—while some of the vineyards also have accommodation available, there are few dining or other experiences for tourists to enjoy in the immediate area.

Beyond the wine route there is little formal coordination of agritourism experiences. Operators interviewed said that cooperation was informal, with operators promoting other businesses through personal recommendation, rather than coordinated marketing. However, there was some evidence that there has been movement towards more coordinated marketing, with some operators advertising other local attractions and the release of the *Farmgate Guide* in 2009.

Perception of what constitutes the region is also important in explaining the model. Aside from the actual wine route, which was considered a regional cluster, most interviewees perceived ‘region’ as Tasmania, rather than the defined study area of the Tamar Valley. There were several impediments to increasing the awareness of Tasmania as a brand, with a key perceived barrier being the cost of shipping small quantities of artisan product to the mainland.

Enablers of agritourism and food tourism

The timeline in Table 17 was constructed by participants during the agritourism focus group, and outlines the key factors and activities that contributed to the development and progression of agritourism in the Tamar Valley region.

Table 17: Timeline of agritourism activities in Tamar Valley

Date	Activities contributing towards agritourism and food tourism
1958	The La Province Vineyard is planted by a French gentleman keen to bring France to the region.
1974	Andrew Pirie founds Pipers Brook Vineyard. He is the first to market the product—bringing an understanding that agriculture was a product and he played a key role in developing Tamar Valley Wine Route.
Early 1990s	Advent of sparkling wine delivers broader investment.
Mid-1990s	The Tamar Valley becomes a new market for state and regional travel.
Late 1990s	The region starts to receive international recognition.
1990s–early 2000s	Tourism in Tasmania increases more generally, ecotourism and adventure tourism gains popularity in the region and the international market opens.
2000	Stillwater River Café opens and becomes the first restaurant in Tasmania to have a Tasmanian wine list.
2009	Development of the <i>Farmgate Guide</i> by Fruit Growers Tasmania Inc

Further to the timeline, study participants commented on a range of other factors that had driven and enabled agritourism in the region. Many responses reflect the strong role that several local champions and leaders played in developing the fine wine industry in the Tamar Valley. In particular, Andrew Pirie, of Pipers Brooke Vineyard, was credited with founding the wine trail and increasing the international profile of the regions’ wine through his connections in the UK and affiliation with the Australian Wine Bureau. Local chefs, such as Daniel Alps, now chef at Strathlyn at Rosevears, also played a role in increasing the profile of food in the region.

More recently other local champions have played a role in establishing food tourism in the region. In particular, several respondents mentioned Kim Seagram, of Stillwater River Café in Launceston, as a leader in regional branding, as Stillwater was the first restaurant to feature a Tasmanian wine list and actively market local produce through its menu and provedore shop.

The success of the Tamar Valley as a tourism destination has also been heightened through its ability to fill a niche market for high-quality, high-value wines. In particular, the region has been successful in creating a niche for sparkling wines, as was discussed in the focus group:

'The investment from actually Champagne itself was the thing that really gave that whole sparkling thing impetus.'

More generally, participants felt that agritourism and food tourism were becoming more popular due to the slow food movement and the interest held by consumers in choosing alternatives to supermarket shopping.

Barriers to agritourism and food tourism

Seasonality and poor weather were considered limitations for agritourism in the Tamar Valley. A key theme was the short duration of the tourist season, which many respondents mentioned lasted for only half the year as noted by one business operator:

'Has been a challenge getting used to the seasonality of tourist numbers—six months of the year there are really not many tourists around at all, so we have had to try to build up the wholesale side of our business to manage the cash flow.'

During the winter some small businesses close altogether, which some study participants feared may have a negative effect on tourism in the area. There were also comments about the behaviour of businesses during the shoulder tourist season, when the tourist numbers were still negligible, with a focus group participant working in support services complaining about the irregularity of opening hours more generally:

'All their advertising said we're open from 10 to 5. I walked in there at 2.10 with seven people, wanted something to eat and wanted to do some wine tasting, "Oh I'm sorry, it's not busy today, we're closing.'

However, a few business owners considered seasonality to be a benefit, such as those that are semi-retired or only running their business part time. In some cases business owners have been able to manage their business to take advantage of the quiet times.

Many respondents also mentioned that the lack of access to wholesale markets on the mainland was a limitation to business expansion and risk management in Tasmania, which may negatively influence the ability or desire of farmers to expand their business. Seasonality of tourism income, combined with lack of access to wholesale markets, means that these businesses do not have the buffer that businesses on the mainland would have under similar circumstances.

A key limitation identified at the focus group was the lack of diversity of food and agriculture experiences in the region. While the Tamar Valley is well-known for its established wine route, there are few dining or other experiential opportunities along the way. While there are a few established food tourism businesses in the general area, such as the Honey Farm, Ashgrove Cheese

and the Christmas Hills Raspberry Farm, these businesses are on the periphery of the region. In short, there was a lack of critical mass and some immature product in the region, as commented on by one business operator:

'If we had a bit more mass in the valley that would help—people often ask us, where can we go for lunch, and there aren't really many places, quite limited... the wine side of things is quite mature, but the food and the produce is lacking at the moment, if we had a mass of those things then we would soon have a really great experience.'

While respondents commented on the abundance of information about various businesses and the wine route on the internet, respondents in the focus group felt strongly that internet marketing was not being used to its full potential. In particular, focus group participants felt that there was a strong need for more businesses to provide online booking tools for tours and experiences, particularly given the lack of reliability of opening hours for businesses in the region, with one participant working in a support service commenting:

'to get that (booking) information is a near impossibility. People just get frustrated because they've got to get a bit there and a bit here.'

Insufficient capital for set up and business development was also considered a barrier to establishment, diversification and expansion. Several business operators commented on the large amounts of capital required to convert to agritourism, or to expand their existing business, with others commenting on aversion to these risks. Related to this theme were some comments about a perceived lack of necessary skills within the farming community, as noted in by a support services participant:

'It is a huge risk for small business operators. To make it successful they have to have the capital, the passion and the knowledge. It's a chicken and egg thing— you have to have the volume for entrepreneurs to realise the opportunity.'

Planning regulations were criticised for impeding development of agritourism for several reasons. In particular, the development application process was considered unclear and onerous by a focus group participant (support services):

'Planning for people who are wanting to grow their business or enter the business, say with farm-gate or whatever, the planning and appeals process ... acts as an inhibitor and discouragement to growing, developing, and even starting.'

Other specific complaints about regulations included unnecessary and restrictive signage regulations, land zoning and the difficulties in acquiring permissions for alterations to heritage listed buildings.

Solutions and opportunities

The key opportunity mentioned in the Tamar Valley case study was improved coordination, to enable support to start-up businesses. Focus group participants mentioned the frustrations associated with accessing information and advice across numerous departments, and suggested that some sort of coordinated start-up pack or access to an agritourism initiation advisor would be useful.

Another suggested solution was to provide better internet marketing options. As mentioned in the barriers section, participants were keen to find a way for wine tours or winery visits to be bookable

online. This would also ease the frustrations of tourists who visit businesses just to find them closed.

Resourcing was also mentioned, with several different uses for resources suggested. One operator felt that support to coordinate regional marketing or the aggregation of small amounts of artisan product for shipping to the mainland would be useful for raising the profile of the region. Financial support to assist start-up businesses was also mentioned more generally in the focus group.

Promoting coordination through festivals was also mentioned. There is now a 'Taste of Tamar' festival running, which promotes coordination.

The potential for encouraging young people to return to agricultural areas and become involved in agritourism was also flagged, although specific means of attracting this group were not discussed beyond trying to make people more aware of the opportunities.

Appendix D: Business operator definitions of success in agritourism and food tourism

The following were responses to the online survey question—‘Based on your response to question 13 above (in which respondents rated the degree of success of their business) can you describe in your own words why you believe your agritourism business is successful or not successful?’ Each dot point represents a different respondent.

- As we place a high value on our quality of life over a high financial return, we would consider ourselves successful. We are able to support ourselves but face many financial challenges at different times of the year due to fluctuating weather and holiday periods. The main reason why we are both able to work full-time in our business is because of our combined expertise. By diversifying we are able to make up for shortfalls in one business area throughout the year with another.
- Our business has enabled us to leave employment elsewhere and provides a comfortable standard of living and lifestyle. It continues to grow financially.
- Response from visitors has been very positive. Bookings are increasing. Income from the business is sustainable and increasing.
- Our level of success is directly dependent on the discretionary spending inclinations of a largely rural community, and visitors to the area.
- By being different we created a ‘blue ocean’ and by providing excellent customer service, high-quality products in innovative ways we have created interest, visitation and great repeat business.
- We have had excellent feedback from our guests who value the opportunity to come onto our property and enjoy the experience we offer. We have a wide range of guests including tourists, getaway, corporate and visiting friends and relatives in the local area. Also a wide range of age groups. Numbers have increased each year and many of our guests return.
- We are passionate about our wines, passionate about the beautiful region, and enjoy meeting people. The physical aspects are attractive, as opposed to being in front of a computer all day.
- We believe our business is successful because it is our intention to breed a superior animal which produces a high-quality product with minimum stress on the animal. As there are not many deer farms around now, people who are staying with us are interested in knowing more about the animals and they are also able to interact with all of the animals on the farm.
- Good-quality local produce is very popular with tourists and locals alike. Consistent and wide-ranging marketing of our brand has given us good access to local markets.
- Generally the public are looking to educate their children on where food comes from.
- Our product has become well-known and sought after, backed up by the numerous awards we have won in olive oil competitions.
- There is an increasing desire to buy local and support producers while keeping money in the community, our business capitalises on that trend.
- It’s an alternative to selling into the capital city wholesale markets. We have a lot of repeat visits and we offer an interesting and happy environment for our visitors, who are mainly Sydney based and culturally diverse.
- Visitors leave pleased, some reorder by email, good reports on the wine quality and selling out of all earlier vintages.
- It’s showing the consumer that fruit doesn’t have to look perfect to taste great.
- This is unique, with great potential for expansion.
- Growth in business, medals won in wine shows, success in garden competitions, publicity received in media, word of mouth recommendations by those who enjoy the experience.

- My business is a success because of the effort I put into marketing and PR and because we have a very good reputation.
- Repeat business, only have guests when it suits me.
- People like to experience animals and countryside. We work to offer a quality product in the farm experience or in functions.
- We are successful to the point that we know dependence on the grape industry is highly problematic, and have begun the process to add additional activities—entertainment events, sale of fresh produce. We should like to enter a period of high growth and expansion, diversify activities and fully capitalise on natural attributes of the farm/vineyard property and known pockets of local and regional demand.
- Because people are now divorced from the reality of real rural life and some would like to have contact with this side of life again.
- Economies of scale and market positioning play an enormous role on the financial viability of an agritourism business. It is a labour intensive business, which requires a high level of skill and quality products and services to produce a return.
- The concept that we offer has attracted a lot of interest in a region that has abundant natural resources and accommodation options, but a limited number of activities which are not adventure-oriented.
- To date it has created a reasonable return for our target market.
- We have a good brand and reputation and very high quality products, good staff and a great location. So outwardly it looks great. From a business perspective it's a lot of work and often the cafe/cheesery only just breaks even so this can be disheartening and financially challenging if it's seen as a drain on the rest of the business even though it's great PR.
- We have had stable sales with small growth; our long-term products that require aging are to come on line in the next 12 months, which will see the business really move into the next stage of growth.
- We have hit the ground running. Our products are all very popular. Feedback from the general community has overwhelming support and the remarks from our visitors book from domestic and international guests is very good. Our cheese is being sold in local deli's and restaurants and IGA stores and has even won Gold twice.
- We went into it with adequate capital. A background in business and marketing. A thorough market assessment. A property big enough to grow much of the fruit we use. A highly competent wine consultant.
- My agritourism business is successful due to my passion for my product and business. I am very committed to safe farming practices and to the delicate surrounding environment. I produce excellent products with repeat customers. I am very concerned that my business may start to decline due to insufficient funds to take my business to a profitable level.
- Our business has been very successful with our customers because it is a quality operation which people will drive out of their way to visit.
- We provide a unique experience at a reasonable cost. This is difficult because the value of our land is increasing so rapidly that the rates are forcing us to charge more and more.
- The plantation and rural landscape is very visually attractive and 'tourists' and locals alike wish to visit real working plantations and our roastery...The desire to 'meet the maker' experience and visit the 'source' of their food is highly valued by our visitors.
- We have only really started but there is great potential and promise for a very successful business operation.
- Mature, established businesses that are sustainable and employing people with a disability. High profile and well recognised. Would benefit in better coordination of attractions, flow path, additional educational focus.
- Our business was a 'start up' that in the space of only two years has established very good brand awareness and financial viability. We have already been awarded numerous awards for our products and have developed a reputation for quality. We sell everything we

produce and there is further demand for our produce. We are currently going through a growth and expansion phase and have recently employed our first employee.

- Quality, green image, healthy image.
- Nearby property trying to do the same.
- We are getting an ever increasing recognition of the quality of our wines by assorted wine writers and getting our wines into more and more top restaurants.
- Passion for what we do and what we have and our farm history.
- Providing and meeting public needs.
- We have a good reputation for breeding calm, healthy cattle which grow on well; guests enjoy the 'personal family touch' and I always give them something unexpected, i.e. carriage/horse/tractor ride, fresh cakes/scones/farm cheese or homemade soaps. It's the WOW factor that is successful. I never scrimp on their food/breakfast basket. Whilst they initially are looking for accommodation they leave here with an experience they don't get anywhere else.
- We get a lot of customers wanting tours on farm and also buying the fruit and vegetables from the farm.
- Our farm tours have been very popular with uni students studying agriculture and veterinary courses and individuals interested in clean food production.
- Fulfilling a need in urban communities to establish links back to farming.

Appendix E: National Long-Term Tourism Strategy and Tourism Research Australia

National Long-Term Tourism Strategy

The Minister for Tourism, Martin Ferguson AM MP, released the National Long-Term Tourism Strategy in December 2009. This Strategy has the support of all State and Territory Tourism Ministers.

The success of Australia's tourism industry depends upon action on both the supply and demand sides of the equation. It is pointless to create new demand if Australia's tourism industry does not have the productive capacity to meet it. Supply-side issues must be given a heightened importance in shaping the future of tourism to ensure Australia's competitiveness.

Elevating tourism to the national status it deserves as one of the key drivers of this economy will require a true public-private partnership. All levels of government and industry will need to work together to reposition the industry on a dynamic growth path for the future, and be accountable for their own areas of responsibility – policy framework for government, and tourism product for industry.

Industry will play a key role in the implementation of the Strategy through membership of the nine working groups that the Tourism Ministers' Council has set up to progress key supply-side issues. The working groups include:

- Labour and Skills Working Group;
- Investment and Regulatory Reform Working Group;
- Destination Management Planning Working Group;
- Tourism Access Working Group;
- Industry Resilience Working Group;
- Tourism Quality Council of Australia;
- Indigenous Tourism Working Group;
- Digital Distribution Working Group; and
- Research and Development Advisory Board.

At the Tourism Ministers' Council in April 2010 the Tourism Ministers allocated an additional \$2.2million to implement the Strategy, and announced 41 practical actions to drive implementation.

Further information about the Strategy is available from www.ret.gov.au/tourism/tmc.

Tourism Research Australia

Tourism Research Australia collects research and intelligence across domestic and international markets and the tourism industry and undertakes respected, reliable research and analysis. Tourism Research Australia manages tourism surveys that cover the inbound, domestic and outbound markets. Key information collected from travellers includes expenditure, places visited, activities, accommodation, transportation and demographics.

Using advanced modelling techniques, Tourism Research Australia develops forecasts of tourism activity twice a year. Tourism Research Australia models regional expenditure and employment and estimates the economic impact and contribution of tourism at the national and state level.

Tourism Research Australia has developed a destination visitor survey program providing customised statistical data at a regional level. The projects are regional initiatives and are aimed at non capital city destinations. A range of Tourism Research Australia key research publications and papers are available on this website. Tourism Research Australia offers a Statistical Enquiries Service for industry operators, academics and other interested parties.

More information and TRA publications can be found at www.ret.gov.au/

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