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Research background and methodology
The Hume region is primed for growth in the agritourism space. There is a desire to take advantage of the region’s abundant natural assets, agribusiness sensibilities and innovative producers to develop new tourism markets that deliver strong outcomes to the local visitor economy.

In order to progress efforts in this area, there is a need to understand what types of agritourism experiences are currently available in-region, where they sit within the product development life-cycle, and which operators have capacity to evolve and innovate to meet market demand.

This research was commissioned by Tourism North East (TNE) in conjunction with Goulburn River Valley Tourism (GRVT). The research is part of a broader exercise as detailed on the following page.
This research report details the outcomes of **Stage 2** in a three part process:

- **Stage 1**: Market research with potential visitors to determine their existing agritourism needs and experiences.
- **Stage 2**: Map industry supply to determine which agritourism experiences are currently available and any development opportunities.
- **Stage 3**: Industry development to match current demand with existing supply and work with industry to develop new agritourism experiences to fulfil product gaps.

*Note that as Quantum was also commissioned to undertake Stage 1 (visitor research available as a separate report), references to alignment with target audience demand are therefore made throughout this report.*

This report details findings from **Stage 2** relating to the following key objectives:

- Identify current agritourism businesses within the Hume region and assess the extent to which they are aligned with target audience demand.
- Understand capacity to evolve the current agritourism offering and the associated drivers and barriers to growth.
Research methodology and sampling

Research comprised of two processes which ran concurrently:

<table>
<thead>
<tr>
<th>Quantitative survey</th>
<th>Qualitative interviews</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Invitation sent out to ~400 agritourism business operators in the Hume region.</td>
<td>• n=36 in-depth interviews conducted either in-person or by phone.</td>
</tr>
<tr>
<td>• Final sample size of n=88 respondents.</td>
<td>• 60 minute discussions.</td>
</tr>
<tr>
<td>• 15 minute survey.</td>
<td>• Sample prioritises those businesses who are more ambitious or connected, which warrant a more significant face to face or telephone contact.</td>
</tr>
<tr>
<td>• Sample representative of total market.</td>
<td></td>
</tr>
</tbody>
</table>

- Research was undertaken in August and September 2018.
- No incentive was offered for participation.
- Rapport building was prioritised to ensure ongoing relationship legacy between RTB and operator.
- Research carried out in accordance to ISO 20252.
Summary and recommendations
Agritourism Visitor Industry Mapping

October 2018

Summary of key findings

1. The Hume region is host to a robust and rapidly expanding agritourism sector. Operators in the category are highly driven, with long-term ambitions for further expansion and diversification.

2. The region has a diverse, year-round supply of quality produce for sale and a strong paid experience offering.

3. Reflecting the enthusiasm of operators to share and educate, a high proportion offer, or plan to offer, paid experiences such as tours, workshops and demonstrations to visitors. It is notable however that only a fraction (8%) of total revenue is currently earned via this channel.

4. The profile of visitors belies that many operators are not attracting the youth market. Indeed, operators self-identify that they lack the marketing acumen to keep pace with the evolving expectations of this challenging audience.

5. There is a widespread sentiment between operators that there is a need for greater collaboration, and for them to have a formal platform from which to benefit from synergies and whole-of-region promotional opportunities.
### Recommendations for TNE & GRVT

<table>
<thead>
<tr>
<th>Recommendation</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Formalise clusters</td>
<td>The scale of the total region is too great to be promoted as a single market. RTBs should formalise clusters (e.g. Seymour and surrounds), to benefit from synergies between operators and whole-of-region promotional opportunities.</td>
</tr>
<tr>
<td>Create a digital platform</td>
<td>A platform featuring every operator in the agritourism space would be a powerful tool to express the depth and breadth of the region to potential visitors. It would also assist with managing seasonality and permit visitors to plan an appropriate itinerary.</td>
</tr>
<tr>
<td>Strengthen the local food system</td>
<td>A strong local food system provides the foundation for investment and innovation. This should be supported, for example by continuing to have a presence on the Local Food Action Plan Working Group.</td>
</tr>
<tr>
<td>Provide support / advocacy</td>
<td>Operators self-identify that funding is the single biggest limitation on their expansion—support for grant applications would therefore go some way toward facilitating growth. Additionally operators are calling for RTBs to assist them in working with planning departments across the region to cut the red tape and streamline the process. In terms of education, marketing acumen is recognised as the most significant gap in many operators’ skill set.</td>
</tr>
</tbody>
</table>
Detailed findings
Agritourism business profiling
The area between King Valley and the Murray at Rutherglen is a hotspot for agritourism within the region.

Q2. What is the postcode of the business?

Postcodes of n=88 online survey respondents:
The majority of businesses are jointly owned family operations

<table>
<thead>
<tr>
<th>Survey respondent type:</th>
<th>Number of employees:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Joint Owner</td>
<td>58%</td>
</tr>
<tr>
<td>Sole Owner</td>
<td>27%</td>
</tr>
<tr>
<td>Employee</td>
<td>15%</td>
</tr>
<tr>
<td>0</td>
<td>5%</td>
</tr>
<tr>
<td>1-2</td>
<td>49%</td>
</tr>
<tr>
<td>3-10</td>
<td>23%</td>
</tr>
<tr>
<td>11-20</td>
<td>14%</td>
</tr>
<tr>
<td>&gt;20</td>
<td>9%</td>
</tr>
</tbody>
</table>

Operators are predominantly from farming backgrounds. However, their current operation may be a diversification away from what generations which preceded them produced.

Tending to be small in scale, agritourism businesses are typically run as a collaboration between family members, with casual staff employed to meet increased labour demands during harvest / holiday periods.

Q1. Please tell us your relationship with the business?
Q4. Besides yourself, how many permanent employees does the business have?
Base: All (n=88)
Despite being small scale, the majority self-identify as commercial operations, not lifestyle businesses

<table>
<thead>
<tr>
<th>Self-categorisation:</th>
<th>Owners dependency:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commercial operation</td>
<td>Main income source</td>
</tr>
<tr>
<td>78%</td>
<td>57%</td>
</tr>
<tr>
<td>Lifestyle business / hobby</td>
<td>Not main income source</td>
</tr>
<tr>
<td>13%</td>
<td>35%</td>
</tr>
<tr>
<td>Other</td>
<td>Don’t know / can’t say</td>
</tr>
<tr>
<td>9%</td>
<td>8%</td>
</tr>
</tbody>
</table>

Of those (9%) who did not self-categorise either as commercial or lifestyle businesses, the majority described themselves instead as being not-for-profit.

Qualitatively it was found that, looking to the future, businesses are frequently driven by a desire to leave a legacy and thus have long-term plans to maintain viability.

Q5. Which of the following best describes the business?
Q6. Is the business the primary source of income for its owner(s)?
Base: All (n=88)
Reflecting growth in the region, a quarter (26%) of businesses were established in the past 5 years.

Operators themselves routinely recognise that the agritourism offering is rapidly expanding within the Hume region. Given this momentum, it is common for operators to feel that the sector has been under-appreciated with a lack of recognition given to their collective status.

The sentiment among operators is that the development of region-wide support infrastructure is lagging behind the potential of the category to benefit from synergies.
Tourism propositions other than produce sales contribute a fraction (8%) of the total revenue to operators.

Revenue share (market average):

- Direct to consumer produce sales (53%)
- Indirect produce sales (e.g. via. wholesaler) (28%)
- Other* (11%)
- Tourism propositions (8%)

This finding reinforces a conclusion from the stage 1 visitor research that paid tourism experiences represent a relatively modest economic contribution to the region as a whole.

* ‘Other’ includes a range of revenue streams unrelated to tourism.

Q17. What proportion of your total revenue comes from each of the following sources?
Base: Those who felt able to answer (n=74)
Operators are observed to be driven by ethical principals

Business values:

- Selling direct to consumer / supply chain control: 75% (Very important), 14% (Somewhat important), 7% (Unimportant), 5% (Don't know / can't say)
- Supporting the development of the region as a whole: 72% (Very important), 23% (Somewhat important), 5% (Unimportant), 5% (Don't know / can't say)
- Commitment to sustainability, biodiversity, and/or regenerative farming principles: 61% (Very important), 31% (Somewhat important), 5% (Unimportant), 3% (Don't know / can't say)
- Educating the public about food and farming: 50% (Very important), 36% (Somewhat important), 8% (Unimportant), 6% (Don't know / can't say)
- Sharing and collaborating with other food and farming businesses: 48% (Very important), 42% (Somewhat important), 8% (Unimportant), 2% (Don't know / can't say)
- Preserving rare / heritage varieties of animals / plants / production processes: 36% (Very important), 32% (Somewhat important), 16% (Unimportant), 16% (Don't know / can't say)

Q22. To what extent are each of the following important to the business?
Base: All (n=88)
Existing agritourism offering
Three quarters (75%) of agritourism businesses are primary producers

Primary production:

<table>
<thead>
<tr>
<th>Produce Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fruit</td>
<td>36%</td>
</tr>
<tr>
<td>Vegetables</td>
<td>26%</td>
</tr>
<tr>
<td>Meat</td>
<td>25%</td>
</tr>
<tr>
<td>Other foodstuff - grains,</td>
<td>25%</td>
</tr>
<tr>
<td>nuts, olives, honey</td>
<td></td>
</tr>
<tr>
<td>Dairy</td>
<td>7%</td>
</tr>
<tr>
<td>Non-food</td>
<td>6%</td>
</tr>
<tr>
<td>No primary production</td>
<td>25%</td>
</tr>
</tbody>
</table>

The region is observed to have an exceptionally diverse offering with no category under-represented. It is clear that this catalogue would be, at least theoretically, sufficient to satisfy the needs of any potential visitor.

Q8. If you are a primary producer, what do you currently produce for sale?
Base: All (n=88)
More than a third (42%) sell fresh produce; wine and jams/preserves are the dominant prepared produce for sale.

<table>
<thead>
<tr>
<th>42%</th>
<th>53%</th>
<th>8%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sell produce in its <strong>raw form</strong> (e.g. fruit or eggs)</td>
<td>Sell produce prepared into other food stuff</td>
<td>Sell produce prepared into non-food stuff</td>
</tr>
</tbody>
</table>

- **Wine**: 45%
- **Jam / fruit preserves**: 34%
- **Sauce / chutney / pickle / etc.**: 19%
- **Baked bread / biscuits / cakes / etc.**: 17%
- **Small goods / salami / cheese / etc.**: 15%
- **Oils**: 9%
- **Dairy / ice cream / yoghurt / etc.**: 9%
- **Beer / cider**: 9%
- **Pies / rolls / lunches**: 9%

There is a widespread desire among agritourism operators to be distinguished from the Hume region wine tourism industry. However, it must be considered that around a quarter of agritourism operators sell wine as a part of their business, and that many wineries are engaged in agritourism in other ways.

Q9. Which of the following do you produce for sale?
Q10. Which types of prepared food do you produce for sale?
Q11. Which types of prepared non-food stuff do you produce for sale?
Seasonality is not an issue for the region as a whole – the majority (83%) of businesses have produce year-round

Seasonality of produce:

- 49% Produce is seasonal, but always have something for sale
- 17% Seasonal
- 34% Produce is not seasonal

Visitors express a strong desire to eat in-season whilst in-region. However, being city bound, their knowledge of what is in season, and what to look for, is limited.

Operators, who experience gluts in supply during peak-harvest, express a need for some method of communicating to visitors at a regional level which businesses they should prioritise on their itinerary at different times of year.

Although there is no period of shortage for the region as a whole, there is still a clear need for a platform to manage seasonality from visitors’ perspective.
The Hume region has a strong experiential offering including widespread events, tours and classes / workshops

Agritourism offering:

<table>
<thead>
<tr>
<th>Offering</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Farm gate / produce sales / cellar door</td>
<td>55%</td>
</tr>
<tr>
<td>Events</td>
<td>45%</td>
</tr>
<tr>
<td>Tours</td>
<td>39%</td>
</tr>
<tr>
<td>Classes / workshops</td>
<td>34%</td>
</tr>
<tr>
<td>Restaurant / cafe</td>
<td>32%</td>
</tr>
<tr>
<td>Retail shop</td>
<td>28%</td>
</tr>
<tr>
<td>Skills demonstrations</td>
<td>23%</td>
</tr>
<tr>
<td>Animal petting / feeding / interaction</td>
<td>17%</td>
</tr>
<tr>
<td>Pick your own</td>
<td>8%</td>
</tr>
<tr>
<td>Other</td>
<td>13%</td>
</tr>
<tr>
<td>NA / do not provide toursim propositions</td>
<td>9%</td>
</tr>
</tbody>
</table>

Visitor research found that the market for engagement with paid experience products is small and highly competitive.

Furthermore, research found that the majority of visitors engage with agritourism in an unplanned way once in-region.

A platform which advertises paid experience opportunities at a regional level, including prices and spots available at short notice, would support operators to leverage the vast majority who are not at the highly involved enough to have pre-booked before arriving.

Q18. Which of the following opportunities do you currently provide for tourists?
Base: All (n=88)
Visitation
Tourist visitor numbers vary significantly between operators

Tourist visitors per year (estimated by operator):

- 100 or less: 16%
- 101 - 500: 16%
- 501 - 1,000: 16%
- 1,001 - 5,000: 22%
- 5,001 - 10,000: 9%
- 10,001 - 15,000: 9%
- More than 15,000: 13%

12,000
Average number of tourist visitors per operator

Q14. Overall, how many tourist visitors do you think the business might welcome in an average year?
Base: Those who receive any visitors and who felt able to estimate (n=64)
Operators perceive that the majority of their visitors are mature (i.e. mid-30s and above)

Visitor type seen most often:

<table>
<thead>
<tr>
<th>Visitor Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mid-life singles / couples (e.g. 36-60)</td>
<td>86%</td>
</tr>
<tr>
<td>Older singles / couples / retirees (e.g. over 60s)</td>
<td>71%</td>
</tr>
<tr>
<td>Young singles / couples (e.g. 18-35)</td>
<td>57%</td>
</tr>
<tr>
<td>Young families (e.g. with children mostly under 12)</td>
<td>53%</td>
</tr>
<tr>
<td>Older families (e.g. with children mostly over 12)</td>
<td>49%</td>
</tr>
<tr>
<td>School groups</td>
<td>14%</td>
</tr>
</tbody>
</table>

The profile of visitors belies that many operators are not attracting the youth market.

Visitor research demonstrated that those aged 18-35, and young families, are regular visitors, with high spend and high dispersion. However, they demand that product is delivered on-trend.

It is observed from this research that many operators are not intuitively capable of evolving their offering to keep pace with the expectations of this discerning market.

Supporting operators to modernise their approach to market will be critical to the development of the strength of the region as a whole.

Q15. What types of tourist visitors do you see most often?
Base: Those who receive any visitors (n=79)

Agritourism Visitor Industry Mapping
October 2018
Future potential
The ambitions of individual operators are aligned with those of the region as a whole

Business ambitions:

- To become more profitable: 93%
- To diversify the services offered: 43%
- To diversify the products sold: 42%
- To become a larger scale operation: 33%
- To secure transport to my main markets / stockists: 15%

Overall, almost two-thirds (59%) of operators are seeking to diversify their services and / or products sold.

Diversification clearly aligns with market demand. Visitor research highlighted that tourists are drawn to novelty and variety which they can’t access in the city, especially when it is tied with being a ‘speciality’ of the region.
Focus on attracting tourist visitation is widespread among operators

On a scale of 1-5, to what extent will the business be focussed on attracting revenue from tourism visitation in the next few years?

Mostly focussed on attracting tourism visitation

1 2 3 4 5

1. 3%
2. 16%
3. 25%
4. 30%
5. 26%

Mostly focussed on other things

Qualitatively it is observed that high levels of curiosity, openness to innovation and willingness to challenge the status quo is evident among the region's agritourism operators. There is an abundance of potential energy within the region which, if appropriately channeled and facilitated, will fuel the desired growth and expansion of the category.
There is a profound desire for collaboration between operators

To what extent would you be interested in collaborating with other operators in your region?

- Very interested (49%)
- Somewhat interested (43%)
- Don’t know (6%)
- Disinterested (2%)

Q26. Base: All (n=88)
When asked their tourism ambitions, a third (38%) spontaneously reference ‘whole of region promotion’

Tourism proposition ambitions (open-ended question):

- Expand retail offering: 40%
- Promote the region as a whole: 38%
- Improve visitor experience: 34%
- Expand visitor experience: 33%
- Attract more / different tourists: 22%
- Improve accommodation: 13%
- Improve catering for children: 6%
- Improve staff / training: 5%

That whole of region promotion is top-of-mind to operators reflects the fundamental ethical principals which underlie their motivation for engagement in the category.

There is strong demand from operators for a regional identity they can align with. Mornington Peninsula / Gippsland are highlighted as regions where this type of support has facilitated significant growth.

Given the size of the total region, it is thought that a number of sub-regions (clusters) should be distinguished and promoted to the benefit of all who lie within them.
Besides retail, paid experiences is the area operators are next most likely to intend to expand into

**Ambition to broaden offering:**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Not something</th>
<th>Provided but prefer not to</th>
<th>May seek to provide</th>
<th>Committed to provide</th>
</tr>
</thead>
<tbody>
<tr>
<td>Farm gate / produce sales / cellar door</td>
<td>25%</td>
<td>8%</td>
<td>35%</td>
<td>33%</td>
</tr>
<tr>
<td>Retail shop</td>
<td>37%</td>
<td>8%</td>
<td>30%</td>
<td>25%</td>
</tr>
<tr>
<td>Events</td>
<td>31%</td>
<td>6%</td>
<td>40%</td>
<td>23%</td>
</tr>
<tr>
<td>Skills demonstrations</td>
<td>26%</td>
<td>15%</td>
<td>37%</td>
<td>22%</td>
</tr>
<tr>
<td>Classes / workshops</td>
<td>21%</td>
<td>10%</td>
<td>50%</td>
<td>19%</td>
</tr>
<tr>
<td>Restaurant / cafe</td>
<td>42%</td>
<td>15%</td>
<td>27%</td>
<td>17%</td>
</tr>
<tr>
<td>Tours</td>
<td>28%</td>
<td>15%</td>
<td>46%</td>
<td>11%</td>
</tr>
<tr>
<td>Animal petting / feeding / interaction</td>
<td>68%</td>
<td>7%</td>
<td>15%</td>
<td>10%</td>
</tr>
<tr>
<td>Pick your own</td>
<td>67%</td>
<td>17%</td>
<td>10%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Operators’ motivation for involvement in agritourism is often rooted in a desire to connect with others and share knowledge. It is therefore unsurprising to find that many have the ambition to expand their paid experience offering.

A key finding from the visitor research was that this apex of the market cannot be accessed casually. Commitment and innovation from a small number of dedicated operators will be required to grow presence in this category.

Q18. Considering those which are not currently provided, to what extent might you provide each one in future?  
Base: All (n=88)
More than a third of businesses directly cater for children

Extent to which children are catered for:

Operators who cater for children report that such provision is an important part of their business, since children are a key driver for adults to engage in agritourism.

It is not appropriate for every business to directly cater for children. However, promoting this opportunity within the region may assist operators to engage with a broader audience.

Q16. Q.16. To what extent are families with younger visitors catered for by the business?  
Base: Those who receive any visitors (n=79)
The vast majority of produce prepared for sale is sourced in-region

Source of produce:

- Own farm: 87%
- Other farms in region: 42%
- Other Victoria: 39%
- Inter-state: 13%
- Overseas: 7%

It is notable that more than a third (40%) of those who source produce from their own farm, also source produce from other local farms.

Operators highlight that this sharing within region increases the dependability of their income, thus enabling them to consider further investments / expansions.

Another important consideration is custom from local resident consumers. This consistent, year-round audience is the essential foundation to many agritourism businesses’ viability.

Although the focus of this project is on tourism, the optimal strategy will include facilitating local distribution paths at its core.
Several barriers may be addressed to support the expansion of agritourism in the region

Barriers to achieving tourism proposition ambitions:

- Lack of funding: 26%
- Lack of time: 22%
- Lack of infrastructure: 19%
- Lack of tourist visitation to region: 17%
- Council regulations: 17%
- Lack of marketing/promotional support: 12%
- Lack of skilled staff: 12%

Qualitatively, operators report that assistance in obtaining grants would be among the most meaningful support they could receive.

Frustrations with planning and regulation requirements (at both local and state level) are widespread and actively deter expansion or even venturing into agritourism in the first instance. Operators are widely calling for advocacy support, to assist them in working with planning departments across the region to cut the red tape and streamline the process.

The most significant infrastructural oversight is felt to be the lack of a digital platform to promote the region(s) as a whole, and connect operators with their target market.

Q24. What do you think are the most significant barriers which you will need to overcome to be able to achieve these ambitions? 
Base: Those who aspire to expanding a tourism proposition (n=78)
Several barriers may be addressed to support the expansion of agritourism in the region

Overcoming barriers to achieving tourism proposition ambitions:

<table>
<thead>
<tr>
<th>Barrier</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Promotional support</td>
<td>37%</td>
</tr>
<tr>
<td>Financial support / grant support</td>
<td>29%</td>
</tr>
<tr>
<td>Expertise sharing / education</td>
<td>21%</td>
</tr>
<tr>
<td>Support from council (unspecified)</td>
<td>10%</td>
</tr>
<tr>
<td>Improved physical infrastructure (roads / trails)</td>
<td>8%</td>
</tr>
<tr>
<td>Simplified regulations processes</td>
<td>6%</td>
</tr>
</tbody>
</table>

It is common for operators to recognize that though they have technical expertise in production (farming background), they lack up-to-date best practice knowledge in marketing their business.

Besides the opportunity for representation on region-wide platform (see previous page), it is common for operators to call for more promotional support, via. knowledge sharing, workshops, seminars, etc.

The demand for marketing support clearly aligns with the expectations of the most lucrative potential visitors. These highly discerning customers are found to be using social media, review aggregators and platforms such as Broadsheet to inform their itinerary. It is certain that there is a need for operators to look ‘off farm’ to keep pace with this challenging environment.

Q24. What do you think are the most significant barriers which you will need to overcome to be able to achieve these ambitions?  
Base: Those who aspire to expanding a tourism proposition (n=78)
Businesses are adopting social media

Active social media presence:

- **Facebook**: 82%
- **Instagram**: 68%
- **Twitter**: 20%
- **Other**: 20%
- **None**: 9%

Adoption of social media reflects the enthusiasm of operators to share and educate.

In addition, operators say they attend farmers’ markets to build brand awareness. As this is a predominantly local audience, it reflects the emphasis operators place on building a strong local food network to underpin their revenue stream.

Q30. On which of the following social media platforms does the business have an active presence?
Base: All (n=88)
Overall, three quarters (74%) are involved with a peak body / group

Peak body / group membership:

- Local / regional food network or group: 53%
- Not a member of any peak bodies or groups: 26%
- Victorian Farmers Market Association (VFMA): 23%
- Accreditation or assurance scheme: 11%
- Victorian Farmers Federation (VFF): 10%
- Australian Food Sovereignty Alliance: 8%
- Other: 26%
- None: 26%

Q31. Are you / the business a member of any of the following peak bodies or groups?
Base: All (n=88)
### TNE region specific findings

- **Operators have a relatively strong relationship with their council and RTB. There is desire to maintain and potentially to increase this relationship.**

- **Operators frequently recognize that the local food movement has strengthened significantly in the past couple of years. This strength provides them stability, which in turn provides a foundation of investment and innovation.**

- **It is widely felt that agritourism specific businesses in the region are not being heard, in part due to their being combined with wine tourism businesses who command a more dominant voice. There is a desire for the two to be treated discretely, with agritourism being recognized and promoted in its own right.**

- **Operators may already be collaborating in small, informal clusters. There is a desire for this to be formalized into sub-regions so that operators can benefit from synergies and the promotional platform which such scale would provide them.**
GRVT region specific findings

Operators in the area surrounding Seymour in particular are calling for a sense of regional identity, both for themselves and for potential visitors who don’t know what they stand for.

There is a widespread sense that the RTB is under-resourced, which makes it hard for them to align with bigger initiatives. Additionally it is felt that there is a critical lack of support from council for any tourism initiative.

Operators broadly agree that a lack of accommodation in the region may be limiting their potential to attract overnight visitation.

Despite there being a relatively large number of operators in the region, they feel that they are not being provided a platform of collaboration from which they can command a meaningful voice and create a presence for themselves.
Questionnaire
Agritourism Visitor Industry Mapping
October 2018

Questionnaire

August 2018  Home Region - Agritourism Industry Mapping  Job No. 12342

Introduction

Thank you for taking the time to complete this survey.

The survey has been developed to assist in mapping the tourism opportunities among selected businesses in the Melbourne area. The project is part of the Tourism North Coast (TNC) and Shoalhaven River Valley Tourism (SRVT).

Please tick the box if you agree to the following statement:

1. This survey will not divulge any identifying information about you.
2. Your responses will be treated with confidentiality.
3. This survey is anonymous.

The survey will take no more than ten minutes to complete. Please answer carefully and honestly.

Screening

You have been invited to participate in this survey as a representative of [business name]. All of the questions in this survey relate to this business.

Q. 1. Please tell us your relationship with the business [*].
   - Owner (100% owner) .............................................. 1
   - Owner (joint owner) .............................................. 2
   - Employee .................................................................. 3
   - Other (specify) ......................................................... 4

Q. 2. What is the post code of the business? [ ]

Please include details of the business overall, including any "agri-tourism" offering (if relevant).

Q. 3. How would you describe the business and what it offers as a couple of sentences? [ ]

Q. 4. Besides yourself, how many permanent employees does the business have? [ ]
   - [ ]
   - Not applicable / no other employees [ ]

Q. 5. Which of the following best describes the business? [ ]
   - A commercial operation ........................................... 1
   - A lifestyle business / hobby ...................................... 2
   - Other [specify] ......................................................... 3

Q. 6. Is the business the primary source of income for its owners? [ ]
   - Yes ........................................................................ 1
   - No ........................................................................ 2
   - Don't know / can't say ............................................ 3

Q. 7. Which of the following describe the business? [ ]
   - Established ............................................................ 1
   - At risk of collapse (20%) ........................................ 2
   - Declining ............................................................... 3
   - Other [specify] ......................................................... 4

[Page 43]
Questionnaire

Q.3. If you are a primary producer, what do you currently produce for sale? (Specify)
   This is an important question, please provide as much detail as you can.
   Bananas / cherries (specify) ...................................................... 1
   apples ....................................................................................... 2
   other fruit (specify) ................................................................. 3
   pineapples .................................................................................. 4
   pumpkins .................................................................................... 5
   savic ............................................................................................ 6
   other vegetable (specify) ............................................................ 7
   dairy - cows .................................................................................. 8
   dairy - goat .................................................................................. 9
   eggs ............................................................................................... 10
   other dairy (specify) ................................................................. 11
   meat - beef .................................................................................... 12
   meat - pork .................................................................................... 13
   other meat (specify) ................................................................. 14
   nuts ............................................................................................... 15
   olives .............................................................................................. 16
   honey .............................................................................................. 17
   wool (specify) ............................................................................... 18
   grains (specify) ............................................................................. 19
   other (specify) ............................................................................. 20
   not applicable / not a primary producer ..................................... 99

Q.10. Which types of prepared food do you produce for sale? (Specify)
      This is an important question, please provide as much detail as you can.
      ice cream .................................................................................... 3
      yoghurt ....................................................................................... 4
      milk .............................................................................................. 5
      other dairy (specify) .................................................................... 6
      jam ............................................................................................... 7
      other preserve (specify) ........................................................... 8
      mixed .......................................................................................... 9
      other baked products (specify) ................................................ 11
      wine ............................................................................................. 12
      oil ................................................................................................. 13
      other (specify) ............................................................................. 14
      not applicable / do not prepare products for sale ................. 99
Q.11. Which type(s) of prepared non-food stuff do you produce for sale?

This is an important question. Please provide as much detail as you can.

- Webb / wooden items (please specify) .................................................. [ ]
- Other non-products (please specify) .................................................. [ ]
- Other (please specify) ........................................................................ [ ]
- Not applicable / do not prepare non-food stuff produce for sale [ ]

Q.12. Where do you source produce to prepare for sale?

- Own farm .......................................................................................... [ ]
- Other local farms (i.e. within your region) ......................................... [ ]
- Other place(s) within Victoria ............................................................ [ ]
- Other place(s) interstate ..................................................................... [ ]
- Other place(s) overseas ..................................................................... [ ]

Q.13. If any of the produce you sell seasonal? If so, which months do you have produce available for sale?

- Produce is seasonal but always have something for sale [ ]
- Produce is not seasonal [ ]

Choose all that apply:

- January .............................................................................................. [ ]
- February ......................................................................................... [ ]
- March ............................................................................................... [ ]
- April .................................................................................................. [ ]
- May .................................................................................................... [ ]
- June ................................................................................................... [ ]
- July .................................................................................................... [ ]
- August .............................................................................................. [ ]
- September ....................................................................................... [ ]
- October ............................................................................................ [ ]
- November ....................................................................................... [ ]
- December ....................................................................................... [ ]

Not applicable / do not have produce for sale [ ]
Questionnaire

Q.14: Overall, how many tourist visitors do you think the business might welcome in an average year?

1. Use a tally to answer: think about an average week and multiply by 52.
2. Assume that includes any visitors you may have (e.g. fire farm gate).

Number per year: _______________ Visitors per year (rounded): ____________________________

Don’t know / can’t say: ____________________________

Zero / do not have data on file: ____________________________

Q.15: What types of tourist visitors do you see most often? (Tick)

- Young singles / couples (e.g. 15-35) __________
- Young families (e.g. with children mostly under 12) __________
- Other families (e.g. with children mostly over 12) __________
- Middle singles / couples (e.g. 30-56) __________
- Older singles / couples / retirees (e.g. over 56) __________
- School groups __________

Q.16: To what extent are families with younger visitors catered for by the business? (Tick)

<table>
<thead>
<tr>
<th>None of the</th>
<th>Somewhat – indirectly catered for</th>
<th>Very well – directly catered for</th>
</tr>
</thead>
<tbody>
<tr>
<td>Babies / toddlers (aged 0-3)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Young children (aged 4-10)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Older children (11+ years)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Q.17: What proportion of your total revenue comes from each of the following sources? (Tick)

- Indirect produce sales (e.g. via wholesalers) __________
- Direct to consumer produce sales (e.g. farm gate) __________
- Tourist/visitor expenditure __________
- Other (specify) __________

Any information (must add up to 100%) __________

Not applicable __________
Questionnaire

Q.14. Which of the following crops do you currently provide for tourist consumption?
1. Fruit
2. Vegetables
3. Nuts
4. Grains
5. Other

Q.15. Considering the crops which are not currently provided, to what extent might you provide each one in future?

Q.16. Thinking about your farm – which of the following are ambitions of the business?

Q.17. To what extent will the business be focused on attracting revenue from tourist activities in the next few years?

Q.18. To what extent are each of the following important to the business?

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Q.23. Keep please focus on what you offer (or may offer in the future) as a tourism proposition. What would you like to do more of, improve, or do differently when it comes to engaging tourists in your region? Once two
Tell us your ambitions. Please provide as much detail as you can.

Q.24. What do you think are the most significant barriers which you will need to overcome to be able to achieve these ambitions? Give two
[Insert specific barriers here]
Tell us what will stand in the way of achieving these ambitions. Please provide as much detail as you can.

Q.25. What type(s) of help or support will help you to achieve these tourism ambitions? Give two
[Provide specific help or support required]
Tell us what you think you need to achieve your ambition. Please provide as much detail as you can.
Q.37. What is your name? (last name) [blank]

Q.38. If the business has a website address please provide it below. (i.e. www.example.com) [blank]

Q.39. How many years has the business been in operation? (answer in whole numbers) [blank] years

Q.40. Of the following social media platforms does the business have an active presence? [blank]
- Facebook
- Instagram
- Twitter
- Other (specify) [blank]

Q.41. Are you / the business a member of any of the following peak bodies or groups? [Blank]
- Local / region food network or group [blank]
- Accreditation or assurance scheme [blank]
- Victorian Farmers Market Association (VFMMA) [blank]
- Victorian Farmers Federation (VFF) [blank]
- Other (specify) [blank]
- Not a member of any peak bodies or groups [blank]

Q.42. We appreciate your time completing this survey, by clicking submit you are agreeing that you have read and understood the below privacy statement which governs how these research results will be used. [blank]
Discussion guide
Discussion guide

Introduction

- Thank you for participating.
- Doing this talk about your views. No right or wrong answers.
- Audio recording.
- About 15-25 minutes.
- Assuredly non-judgemental.
- Don’t need to share anything that you are not comfortable with / which is commercially sensitive.

Adviser: Avoid privacy statement above. By participating in this interview, you give your permission for information gathered to be used by Quantum Market Research and Tourism Victoria to report to a project report. The project report will include identifiable information and be used to understand what assets are available in different regions and where there are opportunities for growth. Any information made public would contain de-identified information only.

Background / business context

- Tell me about yourself: How should I get to know you and how you ended up where you are?
  - Where did you grow up? Time spent in region? On current property?
  - What is your background in agriculture? Education? Work history?
  - What is your background in tourism?
  - Relationship status? Children? Main involvement in the business?
  - Hobbies? Interests? Belonging to the business?

- Briefly, what was the journey to establishing the business?
  - What is your relationship with the business?
  - Where in your background did the idea come from?
  - What did the business look like in the early stages? How has it changed over time?

- Tell me about the business as it is today?
  - Location?
  - Ownership? Employment?
  - A commercial operation / primary source of income? A lifestyle business? New / established business?
  - Balance between primary production / processing / value-adding / tourism?
    - Understanding: establish detailed understanding of what the business comprises and the relative value of each attribute.
    - Number of visitors?
  - What are the business key strengths? What makes the business competitive / viable?
  - What are the business weaknesses? What are you less good at / less well prepared for?
Discussion guide

- How do you promote the business?
  - Social media/website?
  - What have been the most influential channels of promotion?

- What would you describe as being the philosophy of the business?
  - How?
    - Business premises?
    - Ethical considerations? Environmental considerations?
    - Customer service orientation?
    - Quality consideration?
    - Something else?
  - Why do you choose to follow these philosophies?
  - To what extent is this philosophy evident to customers?
  - How does the philosophy assist the business in achieving its objectives? In achieving profitability? Can it be a hindrance?

- When you consider the business as a whole...
  - What is it important for you to know that the business is achieving?
  - What are the biggest risks for the business? What are you doing to mitigate these risks?
  - What do you feel will resources for? And what is more challenging for the business do you need more support with?

Side / Delivery of tourism proposition

- To what extent does the business establish a tourism proposition? It has sought to diversify into tourism over time?
  - What is the relationship between tourism and the core business?
  - What is the level of attractiveness of the tourism proposition?

- Tell me about the tourism opportunities you currently offer?
  - Which are the greatest sources of your income?
  - Which are the greatest revenue generators?
  - What do you find most challenging?
  - What do you wish you could do more of? What prevents you from expanding in this way?

- How are the tourism propositions currently developed/delivered?
  - Where do you find inspiration? Do you consider industry trends?
  - What steps do you take to improve what's offered?
  - Do you consider what others are doing in your region? Other areas?

- Are monitoring visitor satisfaction? Consideration? Visitor preferences/demand? How is this achieved?

- What do you consider to be your target audience?
  - How are they defined? By demographics? By attributes?
  - How are the types of visitors you see changing over time? What do you consider to be an important emerging market?
  - What types of visitors do you see most often? What are commonalities do they share? Is what you do different between different groups or target emerging?
Discussion guide

- To what extent are children catered for by your operation? (Aged 0-4? Aged 5-15? Aged 16+? Directly/indirectly?)

- What are the barriers to delivering a tourism proposition?
  - Probe:
    - Initial barriers to set up/launch?
    - Barriers to growth?
    - Barriers to diversification?
    - Barriers to providing a best-in-class experience (offering)?
  - How are/were each of these barriers addressed/overcome?
  - What additional support would help you to address/overcome these barriers?

- If applicable, tell me about the balance between tourism and other demands of the business (e.g., primary production)
  - To what extent is this easy to manage?
  - What resources does facilitating tourism demand put a strain on the business overall?
  - How do you manage these constraints?
  - What do you feel you are missing which would allow you to connect more to the tourism proposition of your business?

- Tell me about your attitudes towards the region as a whole:
  - Best things about living/operating a business here? Worst things?
  - Regional strengths/weaknesses in primary production? in processing/value-adding? in agritourism? and in tourism more broadly?
  - How does your business in this region compare to what it might be like if you were elsewhere? What are the advantages to you of this region? Disadvantages?

- To what extent do you collaborate with other entities in the region:
  - Probe:
    - With other producers?
    - With other tourism offerings?
    - With peer-based groups?
  - What aspects of the region's support network are strong? Where are they weaker? What the missing/misalignment? What is missing altogether?


Discussion guide

- What type of support would be most meaningful to you to strengthen your agritourism operation/offering? What would this ideally look like?
  - Options:
    - Formal training / workshops
    - Branding / marketing / promotions support
    - Access to better skilled labour?
    - Business support / mentoring
    - Certification / branding / accreditation schemes
    - New markets or sales channels
    - Entering / winning awards
    - Local groups / knowledge sharing
    - Finance / loans / grants
    - Support overcoming challenges with land use / planning
    - Support overcoming regulatory constraints / costs
    - Better access to shared processing / infrastructure (e.g. abattoirs)
  - What would be most meaningful for you? Moderator: Rank top three.
  - Specifically, what type of training / education are you looking for?
  - If you were to receive a meaningful grant – how much would this be? And what would you do with it / what opportunity would it allow you to access?

- Where do you think are the greatest opportunities for the region overall?
  - To what extent would you be interested in collaborating more closely with other operators in your region who are in the agritourism category? How would this best be facilitate?
  - Would you be interested in becoming part of an agritourism driving route which is a regional tourist route or the local area? Dependent on where the potential advantages / disadvantages of this?
Questions?

If you have any questions about this report, please contact Quantum Market Research on 03 9289 9599.