



QUEENSLAND FARMERS' FEDERATION

Primary Producers House, Level 3, 183 North Quay, Brisbane QLD 4000
PO Box 12009 George Street, Brisbane QLD 4003
qfarmers@aff.org.au | 07 3837 4720
ABN 44 055 764 488

Submission

24 June 2021

Tourism Industry Reference Panel
Department of Tourism, Innovation and Sport
Queensland Government
1 William Street
BRISBANE QLD 4000

Via email: tourismrecovery@dtis.qld.gov.au

Dear Sir/Madam

Re: Discussion Paper, Designing Our Tourism Future (May 2021)

The Queensland Farmers' Federation (QFF) is the united voice of intensive and irrigated agriculture in Queensland. It is a federation that represents the interests of 20 peak state and national agriculture industry organisations and engages in a broad range of economic, social, environmental and regional issues of strategic importance to the productivity, sustainability and growth of the agricultural sector. QFF's mission is to secure a strong and sustainable future for Queensland farmers by representing the common interests of our member organisations:

- CANEGROWERS
- Cotton Australia
- Growcom
- Nursery & Garden Industry Queensland (NGIQ)
- Queensland Dairyfarmers' Organisation (QDO)
- Australian Cane Farmers Association (ACFA)
- Queensland United Egg Producers (QUEP)
- Turf Queensland
- Queensland Chicken Meat Council (QCMC)
- Bundaberg Regional Irrigators Group (BRIG)
- Burdekin River Irrigation Area Irrigators Ltd (BRIA)
- Central Downs Irrigators Ltd (CDIL)
- Fairbairn Irrigation Network Ltd
- Mallowa Irrigation Ltd
- Pioneer Valley Water Cooperative Ltd (PV Water)
- Theodore Water Pty Ltd
- Eton Irrigation Scheme Ltd
- Pork Queensland Inc
- Tropical Carbon Farming Innovation Hub
- Lockyer Water Users Forum (LWUF)

The united voice of intensive and irrigated agriculture



QFF welcomes the opportunity to provide comment on the Discussion Paper titled 'Designing Our Tourism Future'. We provide this submission without prejudice to any additional submission from our members or individual farmers.

Background

The success of Queensland's visitor economy plays a key role in the State's overall economic outlook, and the livelihoods of more than 234,000 Queenslanders who are employed in the tourism industry. Queensland welcomed more than 28.6 million visitors spending \$25.5 billion in 2019, however, the global tourism industry is currently facing unprecedented challenges and uncertainty due to the COVID-19 pandemic.

QFF understands that a Tourism Industry Reference Panel has been established to review Queensland's visitor economy, identify opportunities to accelerate the tourism industry's recovery, and seek feedback from industry to help shape long-term success in the sector.

The panel will explore a range of issues, including:

- changes in consumer demand and emerging market opportunities
- Queensland's brand positioning against competitor destinations, as both a State and destination specific brands
- enablers of tourism growth, including skills, infrastructure and technology
- re-building airline capacity into Queensland as well as other transport options
- opportunities for new products and experiences, including shovel ready projects capable of spurring investment, rejuvenation and visitation
- opportunities for events to drive visitation, including to regional areas and during off-peak periods
- opportunities for Queensland to increase its share of international education.

Domestic tourism is set to continue to increase. In a 2020 survey conducted by KPMG, 61 percent of Australian respondents said they were planning on booking a holiday between January and June 2021 and 72 percent said they would book a holiday between July and December 2021¹. KPMG also found that Australians have both the desire and the flexibility to increase domestic tourism in the wake of COVID-19; the financial capacity and the time to close the gap left by international tourists and reduced business travel; recreational travellers could spend 2021 ticking off their backyard bucket list, experimenting with working holidays and romancing with the 'great Aussie road trip'; and, critically, where the money is spent across the industry will shift and players that adapt to compete in surging sectors have the potential to emerge stronger.

Increasing the Benefits of Tourism & Defining Tourism Trends in the 2020's

Queensland Farmers' Federation (QFF) believes that there are growing opportunities for agritourism and has set a vision for Queensland to be the number one agritourism destination in Australia.

QFF defines agritourism as "a tourism-related experience or product that connects agricultural products, people or places with visitors on a farm or rural land." It is important to note that agritourism is unlike other forms of rural tourism, in that it has a direct and intrinsic connection with the primary production activity on farm.

Queensland has an exceptional range of agricultural produce and a beautiful and highly diverse natural environment. We want to encourage more tourists (domestic and international, when permitted), to visit, to stay longer and to spend more money in rural and regional Queensland areas and assist farmers to build and diversify their income streams and be more resilient.

¹ KPMG (2021). Beyond COVID-19 – Time to Explore More of Our Own Backyard. January 2021.
<https://assets.kpmg/content/dam/kpmg/au/pdf/2020/beyond-covid-19-rise-of-domestic-travel-tourism-australia.pdf>

Consumers desire to better understand where their food comes from, learn how it is produced and experience the ultimate in low food miles by enjoying produce where it is produced. Agritourism has an important role in creating a more direct connection between the primary producer of food and drink and the end consumer.

Agritourism will be an important growth industry for Australia's regional and rural economy over the next decade, worth 5.6 billion by 2030. Delivering an additional \$18.6B across transport, accommodation and retail sectors during the same period (CSIRO 2019). Based on Queensland's share of the national visitor economy, this should yield a **minimum of an additional \$4.28 billion dollars for the Queensland economy by 2030.**

Regional tourism has been long recognised as a significant part of the Australian visitor economy, with 44 cents of every tourism dollar, spent in regions². In addition to creating authentic local experiences for visitors, agritourism provides a pathway to market for farmers and food businesses, by creating consumer experiences that benefit agriculture, food manufacturing, retail and the tourism sector.

Agritourism offers opportunities for farmers to:

- Innovate and diversify through value-added products and services
- Smooth volatility of cashflow/income
- Monetise underutilised assets such as farm buildings and natural aesthetic
- Connect directly with consumers
- Create brand, establish provenance and build reputation by sharing their story in the context of their people, place and produce
- Sustain and improve better physical and mental wellbeing
- Provide succession planning opportunities for farm families. It is also important from a rural population perspective that the rural economy is full of skilled, motivated people covering all age cohorts.

The authenticity and desirability of local food and farm experiences is highly appealing. Tourism Australia (TA) and Tourism Events Queensland (TEQ) identify food tourism as a key experience sought by both domestic and international visitors. Agritourism offers visitors an opportunity to experience the source of their food, drink, foliage and fibre.

Obstacles to Progress Development and Grow Agritourism in Queensland

Queensland risks losing market share, falling behind other states like New South Wales and Victoria, as a result of an onerous and complex regulatory environment. QFF in partnership with Agritourism specialists, Regionality Pty Ltd released Queensland's Agritourism Roadmap in November 2020³, to position Queensland as Australia's Agritourism capital.

QFF's Roadmap identifies the core themes and six strategic actions where collaborative effort is required to establish a thriving agritourism sector across regional Queensland. The three core themes are: Strategic Leadership; Regulatory and Policy Reform; and Agritourism Sector Development.

The six strategic actions are to:

² Beyond Tourism 2020 Steering Committee Report to the Australian Government.

<file:///C:/Users/GeorginaDavis/Downloads/TACA12685%20Beyond%202020%20Steering%20Committee%20-%20Gov%20Update%20-%20Web.pdf>

³ See QFF Media at <https://www.qff.org.au/media-releases/industry-launches-roadmap-grow-queensland-agriculture/> and the Roadmap is available at <https://www.qff.org.au/wp-content/uploads/2020/11/Queensland-Agritourism-Roadmap.pdf>

1. Establish an Agritourism Leadership & Strategy Group (ALSG) to champion and drive cross sectoral and interagency leadership across government and industry to co-deliver the Roadmap. QFF has established an ALSG with critical stakeholders from the tourism sector and provides secretariat support to the Group.
2. Deliver the necessary policy, regulatory and program reforms to facilitate the growth of Queensland’s Agritourism sector. On 5 July 2021, QFF will publicly release a Discussion Paper on Land Use Planning Reform to Facilitate Agritourism (consultation will close on 26 July). Stakeholder consultation on QFF’s Discussion Paper has already been undertaken with the Department of State Development, Infrastructure, Local Government and Planning, and the Local Government Association of Queensland.
3. Deliver farmer focused, mentoring and development programs to develop viable agritourism clusters in regional Queensland. Some local government’s such as the Scenic Rim Regional Council and Moreton Bay Regional Council are facilitating business development opportunities for their agricultural stakeholders already.
4. Establish a branding and accreditation framework to recognise and promote high quality, authentic agritourism experiences in Queensland.
5. Feature Queensland’s agritourism businesses in consumer-focused marketing and promotional programs and campaigns.
6. Encourage the development of a skilled workforce to deliver high quality agritourism experiences.

The challenges faced by farmers seeking to diversify into agritourism are complex and significant. Agritourism must meet the needs of the farm and the farmer and this is a key consideration in identifying their agritourism offering. Agritourism is not like other forms of tourism because:

- Farmers have a day job, work on the farm will not wait and must be the priority.
- The farm is not just a workplace it is the farming family’s home, it is their identity, it is their story, it is their past, present and future.
- Farmers do not speak ‘tourism language’ or understand the sector.
- Farms are not like tourism attractions or shops that can ‘shut the door’ at 5 pm and go home.

Farms also have legal responsibilities for safety, animal welfare and biosecurity. Agritourism can be a particularly valuable option for small to medium family farms seeking to improve viability. However, the concept of multifunctional approach to farming⁴ (where a farm engages in a range of business functions rather than focusing entirely on primary production) presents a range of challenges for the agripreneur, not least of which is entering a new sector and learning new skills.

In many instances, land-use planning and other regulatory requirements present a significant barrier to agritourism. In 2010, ABARES conducted research to identify the ‘Drivers of Food and Agritourism in Australia’⁵ and identified barriers and institutional drivers.

Barriers	Institutional Drivers
<ul style="list-style-type: none"> - Regulatory issues - Lack of institutional understanding of agritourism - Lack of skills or perceived lack of skills - Lack of farmer or agriculture industry involvement - Small business resourcing issues 	<ul style="list-style-type: none"> - Clustering and linkages - Tourism networks - Marketing and market research - Integration and support—coordination at regional and local scales

⁴ *Planning for Innovation in Agriculture Through Multifunctional Farming*, Wright, R, 2018

⁵ See <https://www.agriculture.gov.au/sites/default/files/abares/documents/agritourism-2010-report-11a.pdf>

Local Government Planning Barriers

As an emerging sector, removing local government planning barriers requires bespoke, rather than generic planning controls that allow farmers some flexibility while protecting the agricultural productivity for future generations.

It is our experience most farmers want to take a conservative approach to agritourism, evolving their venture over time, to test and trial the suitability of agritourism on their property and in their region, and then to grow at a pace that meets both their economic needs and consumer demand. While this approach is logical, the planning instruments in Queensland make it extremely difficult to achieve.

Rather than treat all agritourism as the same or, as is currently the case, all forms of rural tourism the same, we recommend regulations are designed in a way that considers the scale, frequency and ancillary nature of the activity as it evolves in each scenario. Given the diversity of agriculture across regional Queensland, we recognise that the degree to which an ancillary use remains secondary to the principal use should be determined for each particular circumstance, that is the Planning Act 2016 intends for these determinations of whether a use is ancillary to be made on a case-by-case basis.

QFF's Discussion Paper on Land Use Planning Reform to Facilitate Agritourism describes five core activities that encapsulate the scope of agritourism that may be considered under the main definition of agritourism ranging from accommodation through to food processing.

While land use planning is not the only barrier to agritourism development, it is consistently one of the most common deterrents for farmers in Queensland and other states. Queensland, however, has some unique challenges in relation to planning. These extremely onerous requirements impact the cost, time and complexity of the requirements for even the smallest scale activities. One of the most significant challenges to obtaining approval is the requirement for a Material Change of Use (MCU) for most agritourism activities, regardless of scale and frequency, that may fall under the banner of agritourism. While some activities fall under the scope of "an exempt material change of use", agritourism is not clearly defined and is therefore not included in this category. These barriers need to be reconsidered and regulation needs to change if the forecast agritourism opportunities are to be realised in Queensland.

QFF seeks Government support (state and local) to remove onerous local government planning restrictions to small-scale agritourism ventures. Desirable outcomes of policy and planning reform would be to simplify the terminology and provide some consistency across the state and to enable farms to establish 'start-up' or small scale agritourism ventures as a trial before committing more fully and undertaking planning approvals for scaled-up operations that would be subject to planning approvals. One of the most significant challenges to obtaining approval is the requirement for a Material Change of Use (MCU) for most agritourism activities which should be waived for small-scale activities.

We look forward to engaging with the Tourism Industry Reference Panel on the issues and opportunities identified in our submission. If you have any queries, please do not hesitate to contact me directly at georgina@qff.org.au.

Yours sincerely

Dr Georgina Davis
Chief Executive Officer