



Queensland Farmers' Federation Agritourism Roadmap



“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. 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.”

Dr Georgina Davis, Queensland Farmers' Federation

“Agritourism is where two distinct and very different sectors meet to create something that is greater than the sum of its parts, adding value to both sectors. It enables farmers to convert ordinary farm activities into extraordinary agritourism experiences by creating meaning and value through story.”

Rose Wright, Regionality

Prepared by Rose Wright – Managing Director

Regionality Pty Ltd is a highly regarded specialised consultancy working across Australia in the areas of agriculture, food and regional tourism, delivering strategic support to assist regions with business innovation programs and cluster development. We are honoured to be recognised as Australia's agritourism thought leaders by our peers. We are proud to support the Queensland Farmers Federation by providing this roadmap and look forward to continuing our partnership with an organisation known for strong industry leadership and creating a culture of cross sector collaboration.

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Executive Summary

Agriculture = Approximately \$13 billion or 21% of national agri-food economy	Tourism = Approximately \$24.6 billion or 23% of the national visitor economy
<i>“Agri-tourism should promote cross-industry growth. This includes accommodation, transport and retail sectors, valued collectively at \$18.6B by 2030.”</i>	
Based on Queensland’s share of the national visitor economy, this should yield an additional \$4.28 billion dollars for the Queensland economy by 2030... but will it?	

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). Queensland risks losing market share, falling behind other states like NSW and Victoria, as a result of an onerous and complex regulatory environment. Queensland Farmers’ Federation (QFF) in partnership with Agritourism specialists, Regionality Pty Ltd has developed the *Queensland’s Agritourism Roadmap* to position Queensland as Australia’s Agritourism capital. The 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:

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 will provide strategic leadership for the partnership.
2. Deliver the necessary policy, regulatory and program reforms to facilitate the growth of Queensland’s Agritourism sector.
3. Deliver farmer focused, mentoring and development programs to develop viable agritourism clusters in regional Queensland.
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.



Understanding the opportunity

Regional tourism has been long recognised as a significant part of the Australian visitor economy, with 44 cents of every tourism dollar, spent in regions. 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 their consumers; and
- Create brand, establish provenance and build reputation by sharing their story in the context of their people, place and produce.

To clearly understand the opportunities and challenges, we must first clarify and define agritourism. Regionality defines agritourism as

“A tourism-related experience or product that connects agricultural products, people or places with visitors on a farm or rural land.”

Regionality developed this definition to provide clarity in the Australian context. It has been adopted by Australian Regional Tourism and by others including the NSW Government through its work on the NSW Agritourism Pilot Program.

In practice, agritourism is where agriculture and food economies intersect with the visitor economy. To succeed in Queensland, agritourism requires a commitment from both government regulators and the agriculture and tourism industries to work differently. Tourism needs to integrate local food and produce into



their offering and agricultural business models need to recognise a consumer facing value chain. Broadening conventional definitions of a farming enterprise to include tourism, retail or processing will assist state and local government regulators and policy makers better support agritourism.

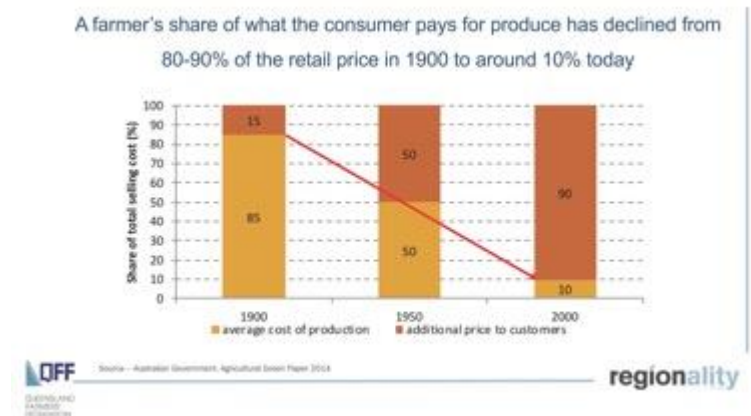
For those who have ventured beyond the farm gate, agritourism provides an opportunity to connect directly with consumers and to not only sell produce, but also value-add to produce and place through the provision of products, services and experiences. While the wine industry has a long-established pathway to market using agritourism (cellar door), most other agricultural sectors are only now starting to comprehend the concept of agritourism as another way to market their products and increase the potential return on investment for their agribusiness by creating a direct emotional connection with their customer.

Why Agritourism?

According to the Australian Government's 2014 *Agricultural Competitiveness Green Paper*ⁱ, the percentage of the farmgate price relative to the consumer cost for food has shifted in a century from almost 90% to the farmer in the year 1900 to the farmer receiving around 10% in 2000. Due to these slim margins, farmers relying on the traditional centralised markets or supply chain methods have become price takers where the only way to make the farm profitable, is to increase the volume of production. Farmers in coastal and peri-urban regions have limited scope to increase land holdings; therefore the volume of production, due to the high cost of agricultural land per hectare. The result is that these types of farmers with relatively small holdings will be forced to look at other ways to remain viable such as

- Rely on off-farm income
- Intensify production or
- Investigate options for value adding and diversifying income shifting away from a volume based business model to one that generates higher value.

Regions located within a two hour drive radius of an urban centre or a tourism base have significant scope to develop both agritourism and food tourism as a way to create opportunities for farmers to add **value rather than focus on volume**. Agritourism, when planned and delivered well in a regional community creates a vibrant and dynamic offering for locals and visitors, encourages dispersal of tourism expenditure to rural areas and spreads the tourism dollar beyond the tourism into agriculture.



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 domestic and international visitors. Agritourism offers visitors an opportunity to experience the source of their food, drink, foliage and fibre. Again, the wine industry is perhaps the most successful example of how value added agricultural-based experiences can be attractive to consumers and help expand the offering in a region. The same concept can apply to a broad range of agricultural products enabling farmers to create on farm value-adding, sales and experiences that engage and educate the consumer in the story and process of food and drink production.

The other aspect to consider in developing agritourism is the opportunity to support integration of local food into the mainstream tourism offering. Developing a farm to plate connection will have several benefits for the region. It will help both agriculture and tourism to collaborate and help to differentiate the offering in each region.

Agritourism creates opportunities for farmers and regions to thrive, by connecting the agri-food economy with the tourism economy. It enables farmers to convert ordinary farm activities into extraordinary agritourism experiences by creating meaning and value through story. Agritourism is an opportunity for farmers to value add, diversify, use spare capacity and underutilised assets. Agritourism

- Creates jobs and generates revenue (smoothing income)
- Builds resilience
- Restores pride and identity
- Creates a succession or transition pathway to new generations
- Drives innovation
- Creates opportunities to build brand value through direct connections with consumers
- Builds and differentiates Queensland's produce into a strong brand, aligning with #eatqld and the new 'Product of Queensland' and 'Queensland Grown' labeling
- Transforms farmers from price takers to price makers
- Provides economic and skilling opportunities and future financial security, particularly for women in agriculture. ^{vi}

Recognising the challenges

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 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 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 farmingⁱⁱ (where a farm engages in a range of business functions rather than focusing entirely on primary production) presents a range of challenges for the agrarian entrepreneur [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 Australiaⁱⁱⁱ.” This report identified barriers and institutional drivers that the Roadmap seeks to address through its three core themes.

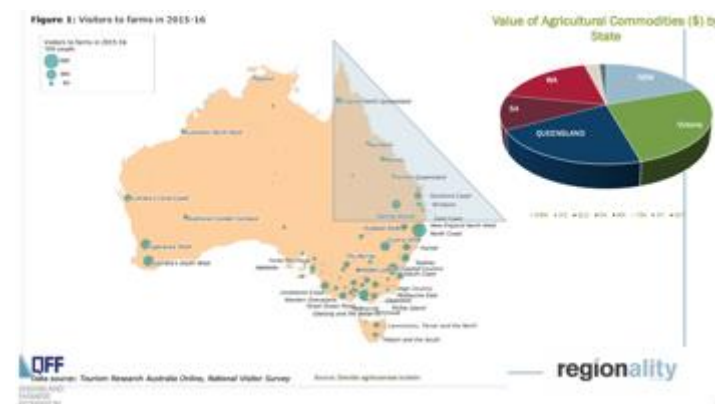
Barriers	Institutional Drivers
<ul style="list-style-type: none"> - Regulatory issues - Lack of institutional understanding of agritourism - Lack of skills or perceived lack of skills - Lack of farmer or agriculture industry involvement - Small business resourcing issues 	<ul style="list-style-type: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

Queensland's Agritourism Challenge

While Queensland has enormous potential for agritourism due to the scale and diversity of production, there are significant barriers that need to be addressed to enable the sector to flourish. Some of these challenges are common across all states and territories and relate to the cross-sector nature of agritourism. **Queensland's planning system makes it particularly difficult** and costly to support agritourism and on-farm diversification and value adding. The current planning system is not agile when it comes to the consideration of alternative uses such as agritourism and farm value adding in a contemporary and practical way.

The change in consumer trends demanding greater traceability and provenance^{iv} creates an opportunity to retain the agrarian landscape by enabling greater value to be extracted from more traditional forms of primary production through value adding on farm and agritourism. To facilitate this alternative outcome, investment supply side development through focused capacity building programs to support farmers to establish agritourism and agri-food innovation, along with policy and regulatory reforms are required. The default is to invest in marketing, however investment in demand generation without supply side development and strategic regulation reform is unlikely to yield the desired outcomes.

Figure 1 and 2 demonstrate the dispersal of agritourism and farm gate visits throughout Australia, while the pie charts show the comparative size of the agricultural sector for each state. Given the size of agricultural production in Queensland and the dispersed regional visitor economy, **Queensland appears to be underperforming in agritourism when compared to NSW and Victoria**. It should also be noted that it is likely that some of the numbers attributed to the Gold Coast in Figure 2 are likely to be farm gate visits in the Tweed in Northern NSW, given the cross border tourism collaboration in this area, potentially reducing the sector in Queensland even further.



The key point is that if Queensland is to tap into the agritourism opportunity, it requires focused strategic intervention in the form of industry development and regulatory reform to build the critical mass required to be considered a viable agritourism destination.

Table 1 – Snapshot of key challenges

Challenge	Potential solution or action
<p>Agricultural Sector: A lack of understanding of what agritourism is and its potential to provide a pathway to market and a value add to core agricultural activities.</p> <ul style="list-style-type: none"> - Agricultural agencies concern that agritourism will undermine agricultural production - Farmers capacity to <ul style="list-style-type: none"> o Identify the opportunity o Navigate the planning and regulatory pain points o Having the skills, knowledge and capacity to plan and deliver the agritourism business o Knowing the value of their own story and how to share it o Collaborate rather than compete - The need for a cluster approach to ensure critical mass and viability - In emerging regions, the pain points associated with change, particularly in the establishment phase to build critical mass to make the sector viable 	<ul style="list-style-type: none"> - Bring together key agricultural groups to ensure they are involved and understand the concept and the role they play. - Invest in a catalyst project that delivers specialised capacity building programs that will support a cluster of farmers to innovate (e.g. Regionality's Agri-food/agritourism Business Development Program)
<p>Tourism Sector: Mainstream tourism sector not understanding the consumer appeal of locally sourced food and drink and how to integrate the offering into their business</p> <ul style="list-style-type: none"> - Local sourcing of produce can be a logistical and financial challenge for food service sector 	<ul style="list-style-type: none"> - Education, value chain networking and focused support to help existing operators to integrate regional food and drink offerings - Cooperative local sourcing and distribution solutions - Marketing programs that feature these operators
<p>Local Government</p> <ul style="list-style-type: none"> - Land use planning and regulatory challenges due to emerging nature of the activity - Economic development v tourism focus - Alignment between strategy and practice 	<ul style="list-style-type: none"> - Interdepartmental collaboration to support the agritourism outcome with workshops to ensure strategic alignment between the economic and tourism goals and the regulation and land use planning practice - Workshops with staff and councillors to ensure alignment - Collaboration with LGAQ and Council of Mayors Groups

Challenge	Potential solution or action
State Government <ul style="list-style-type: none"> - Agritourism is an emerging area that is does not sit comfortably in any one department. - There is no clear policy or strategic direction to guide its development - It does not have a Minister or Department to own it therefore it slips between the cracks, hence the inability to resolve some of the intractable problems - Planning and regulatory frameworks developed by the state and implemented by local govt do not clearly define agritourism, leaving it open to interpretation. 	<ul style="list-style-type: none"> - Prioritise the development of a Queensland Agritourism Strategy /policy framework under Minister for Regional Development and Minister for Agriculture to ensure interdepartmental collaboration and support - Commit resources to industry development and regulatory reform to support sector growth - Prioritise planning reforms that enable small scale agritourism activity that is ancillary to primary production

Strategic intervention is required

QFF recognises the importance of agritourism for farmers and regional Queensland and appreciates the important role industry needs to play in providing strategic leadership. Agritourism is an opportunity for both tourism and agriculture, however, it requires cross sectoral collaboration to be effective. Previously, tourism initiatives have attempted to support agritourism development, with limited success due to a lack of focus on the farmers themselves.

The QFF Agritourism Roadmap has been developed to assist Queensland to realise the \$4.5 billion dollars that could be generated by the Agritourism sector for the Queensland economy by 2030. The QFF Agritourism Roadmap advocates for strategic interventions that will unlock the potential of the agritourism sector. It will facilitate improved:

- Leadership: agricultural leadership to build confidence and engagement throughout the farming sector
- Awareness: farmers do not know what they do not know – build experience, knowledge and skills
- Compliance: ensure farmers do not ignore their regulatory responsibilities, putting the family farm at risk
- Experiences: helping farmers to understand the customer, their value proposition and how to market
- Destinations: facilitating a regional cluster approach, one lone farmer does not make an agritourism destination
- Enterprises: Agritourism venture planning is unlike other business planning and tourism development. It is a specialised approach that needs to build upon and complement the existing farming operation.

If agritourism is to flourish, strategic intervention is required to change not just the way farmers think about the opportunity, but also how state and local government, and industry work together to ensure the regulatory environment, policy settings and culture of collaboration supports the sector's establishment and growth. Regions like Scenic Rim, Mackay, Sunshine Coast and Mary Valley, Darling Downs, Granite Belt and the Atherton Tablelands have all benefitted from some form of strategic intervention and cluster development including focused business development programs. These efforts have resulted in clusters of farmers

diversifying into food and agritourism ventures, hampered by a regulatory environment that is not fit for this purpose. Given the nature of the reforms required, these issues cannot be addressed at a regional level. A state-based approach is required.

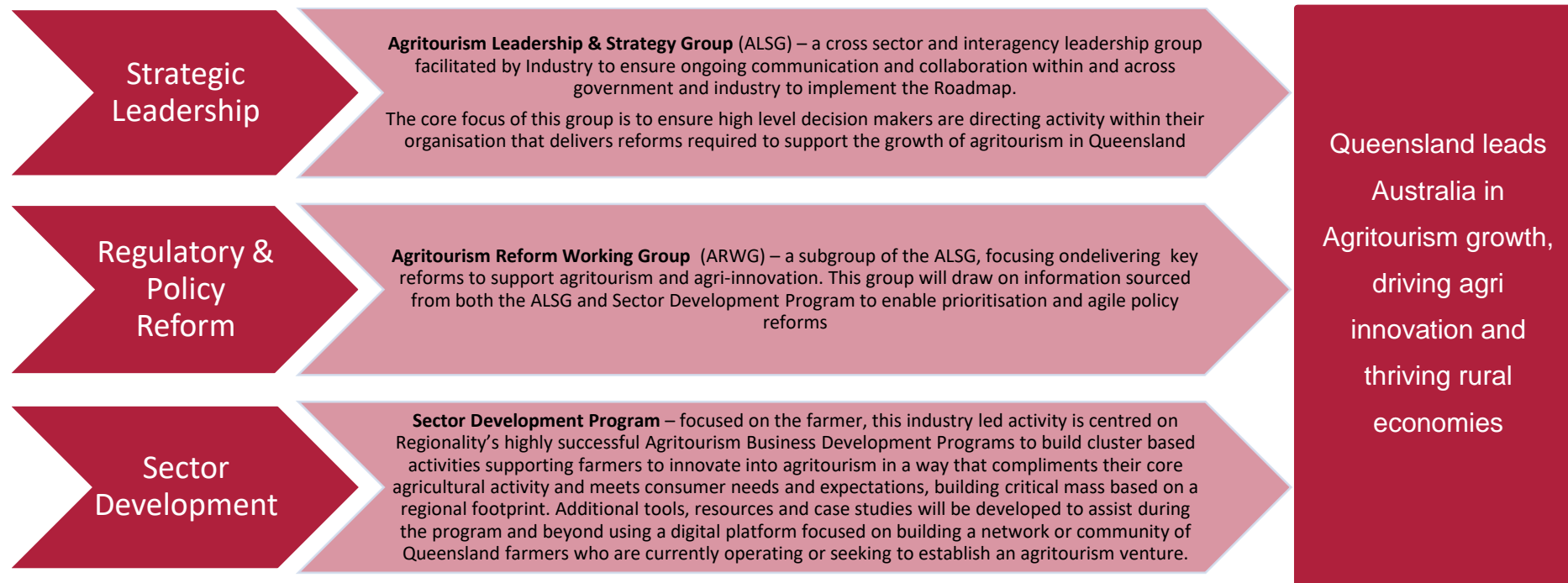
In summary, agritourism thrives when focused strategic intervention is applied to

- Facilitating cross sector collaboration to support change at an industry level through capacity building in both agriculture and tourism
- Investment in targeted supply side development through cluster development programs targeting farmers based on tourism region footprints
- Creating a supportive business ecosystem through active engagement with regulators, policy makers and planners to facilitate regulation reform and simpler processes
- Regional food systemic change to support distribution and logistics of local produce and
- Provenance branding of local food and value chain businesses that source and feature local ingredients to customers through their retail and food service offerings to customers.

Priority actions

The QFF Agribusiness Roadmap is a two-year program of strategic intervention to build achieve the following strategic objectives

1. **Develop strong leadership** starting at the supply end of the pipeline (farming) and managing the migration of the sector from agriculture to tourism
2. **Collaborate with governments to achieve regulatory reform** and interagency cross sectoral collaboration and leadership to problem solve and adjust policy and regulations as the issues are identified and then test them through the program roll out to ensure the settings are right
3. **Build the capacity of farmers** to identify the best agritourism opportunity for them and how to go about it while complying with land use planning and other regulations through specialised capacity building programs. To be effective and ensure ongoing access to support, it is important to develop both digital and face-to-face support for the current cohort and create an ongoing legacy of resources, information and support for future agritourism operators
4. **Create critical mass** through cluster development in regions, commencing with a pilot program delivery across six clusters across Queensland regions
5. **Establish a small agritourism start up grants** program to support farmers with startup costs
6. **Agritourism accreditation program** to identify farmers who are both compliant and meet industry standards and to build consumer awareness of the offering
7. **Develop a youth agritourism skills program pilot** by collaborating with the education sector, to support specialised high school training that will enable provide a strong base knowledge for young people wanting to enter a career in farming and agritourism
8. **Work with tourism to build strong consumer demand** for our state's agritourism offering and to position Queensland as a hub for agritourism and agri innovation



Core Themes	Strategic Actions	Aspirational Outcome
Strategic Leadership	<p>1. Establish an Agritourism Leadership & Strategy Group (ALSG) – a cross sector and interagency leadership group to ensure ongoing communication and collaboration within and across government and industry to co-deliver the Roadmap.</p> <p>The core focus of this group is to ensure high level decision makers are directing activity within their organisation that delivers reforms required to support the growth of agritourism in Queensland</p>	Members of ALSG have the authority to direct action within their agency or organisation to support agritourism
	<p>1.1 Deliver changes to policy and regulation, processes and practices that remove internal barriers to farm innovation by engaging key staff and facilitating strategic alignment between departments within local and state governments</p> <p>1.2 Provide advice to government and key stakeholders on the progress of the Roadmap implementation</p> <p>1.3 ALSG to meet quarterly to ensure ongoing collaboration in delivery of the roadmap and create a culture of cross sector collaboration connecting agriculture, food and tourism sectors and supporting their development</p> <p>1.4 Oversee coordinated approach to the reform agenda and sector development activities.</p>	A coordinated approach to strategic intervention that creates a thriving agritourism innovation ecosystem in Queensland
Regulatory & Policy Reforms	2. Deliver reforms to policy, regulations and programs that support agri-innovation and agritourism growth in Queensland	A progressive regulatory and planning system that enables farmers to establish on farm innovation, value adding and agritourism

Core Themes	Strategic Actions	Aspirational Outcome
	<p>2.1 Establish an Agridourism Reform Working Group (ARWG) – a subgroup of the ALSG, focusing on key reforms to support agridourism and agri-innovation. This group will be responsible for recommending strategic reforms to ALSG that remove barriers to the development of agridourism in Queensland. The working group must include key agencies and industry organisations to ensure ongoing policy regulatory reform to support agridourism. E.g. Planning, Agriculture, Tourism, SafeFood Qld, Transport, Education, QRIDA, Environment, Liquor & Gaming etc</p> <p>2.2 Create a reform agenda informed by industry feedback and data from cluster pilot program delivery (see 3.2)</p> <p>2.3 Ensure government agencies and industry groups work collaboratively to support agridourism ventures once established, by integrating agridourism support programs in their deliverables</p> <p>2.4 Create a data collection framework to measure the impact of the reforms and monitor and evaluate their effectiveness ins stimulating and supporting sector development</p>	<p>An agile reform process that can address barriers as they arise.</p> <p>Agridourism model planning code that includes definitions that allow on farm</p> <ul style="list-style-type: none"> - Processing - Sales - Accommodation - Experiences and - Events <p>A system that recognises and supports rather than impedes, small scale start-ups on farm</p>
Sector Development	3. Deliver farmer focused sector development programs to support the establishment of viable agridourism clusters in regional Queensland	Queensland's sector development focus delivers significant growth in agridourism start-ups and the establishment or growth of six regional agridourism clusters.
	1.1 Establish an Agridourism Sector Working Group (ASWG) to oversee the implementation of sector development program and to ensure coordination and collaboration between various industry organisations and government agencies. This group reports to the ALSG and works with the ARWG.	

Core Themes	Strategic Actions	Aspirational Outcome
	<p>1.2 Roll out six regional pilot cluster-based capacity building programs for farmers to help farmers learn, plan and proceed through planning and development pathways with mentoring and support. This project will provide a live case study to inform, test and facilitate agile regulatory and policy reform (see 2.2)</p> <p>1.3 Establish an Agritourism Start-Up Grant to help farmers fast track development in pilot regions</p> <p>1.4 Establish a digital platform to connect the agritourism sector and to share information to support industry growth and development, such as case studies, business development resources and information.</p> <p>1.5 Review the pilot program and make recommendations to ALSG to support the roll out of an expanded cluster development program (3.2) and a start-up grant program (3.3)</p>	<p>An ongoing program is established to support further sector growth to ensure Queensland becomes Australia's Agritourism capital.</p> <p>Ongoing support and mentoring delivered via a bespoke digital platform for aspiring and established agritourism businesses.</p>
	<p>4. Establish a branding and accreditation framework to support growth of high quality and authentic agritourism products and experiences in Queensland</p>	<p>Queensland establishes a reputation for high quality and uniquely Queensland agritourism offerings, driving significant growth in demand</p>
	<p>4.1 Establish an agritourism accreditation program managed by Queensland Farmers' Federation to encourage and support farmers who are compliant and operating legally</p> <p>4.2 Create a provenance framework to support the authenticity of "#eatqld" (see 4.1b) and the Grown in Queensland and Product of Queensland labelling (</p> <p>4.2.1 Develop a marketing and brand strategy to support the development of #eatqld provenance brand</p> <p>4.2.2 Provide industry training to support appropriate use of the #eatqld brand and/or logos</p> <p>4.2.3 Create a data collection framework to support regions to create seasonal and regional produce books and collate this into an "#eatqld" digital guide</p> <p>4.3 Develop a strategy that aligns state and regional sub branding with tourism regions</p>	<p>Queensland's reputation for high quality fresh and value-added food and drink drives demand for Queensland agri-food products and experiences (to domestic and international consumers)</p>

Core Themes	Strategic Actions	Aspirational Outcome
	4.4 Support industry adoption and use of the brand	
	5. Ensure Queensland's agritourism businesses are engaged and featured in consumer-focused marketing and promotional programs and campaigns that build Queensland's reputation for agritourism	Tourism and agriculture work together co-brand and market to domestic and export customers
	5.1 Connect new agritourism operators with local, regional, state and national agencies in tourism (LTO, RTO, TEQ, QTIC & TA etc) and business to support their ongoing growth and development	
	6. Ensure Queensland leads in upskilling staff to deliver high quality agritourism experiences	Agritourism drives renewed interest in careers in agriculture and tourism sectors. Queenslanders wanting to pursue a career in agritourism are given education pathways that provide a suit of skills that enable them to deliver world class experiences
	6.1 Promote cross sector collaboration by supporting cross sector industry networks and gatherings	
	6.2 Provide specialised training for LGA and Regional tourism, agriculture and economic development staff to enable them to understand how to support the growth of agritourism within their roles and regions	
	6.3 Develop a youth agritourism skills program pilot to support specialised high school training that will provide a strong base knowledge for young people wanting to enter a career in farming and agritourism	

i Commonwealth of Australia 2014, Agricultural Competitiveness Green Paper, Canberra, October

ii Planning for Innovation in Agriculture Through Multifunctional Farming, Wright. R, 2018

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

iv Talking 2030 discussion paper, KPMG and NFF

vi Queensland Farm Businesswomen: The Long Road to Leadership, QFF 2020