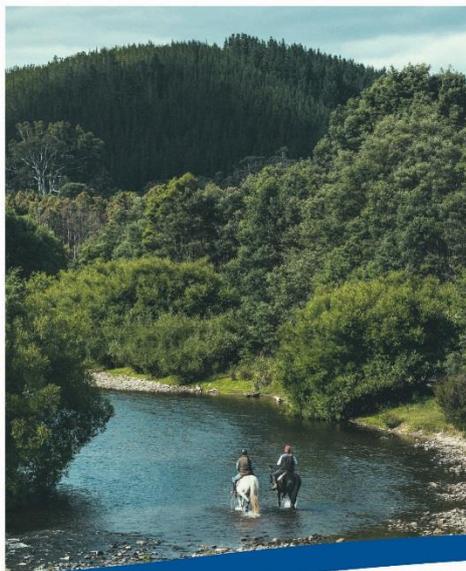
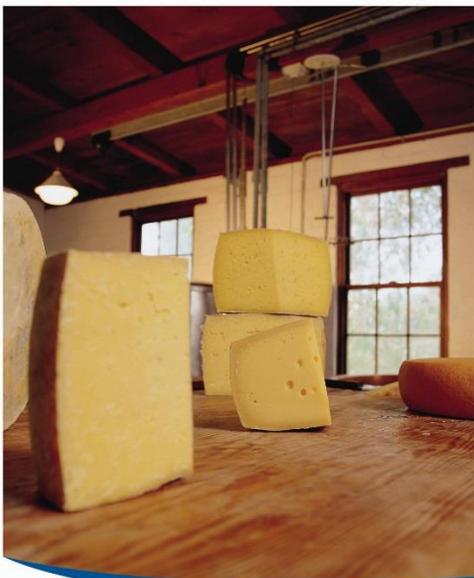


Agri-tourism Strategy



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Images: Fat Pig Farm, Gary Moore, Gerard Wood, Michelle Crawford, Peter Whyte, The Creech and Tourism Tasmania.

Introduction

The Tasmanian Government is working to support industry and harness opportunities to encourage job creation and to grow the state's economy. Agriculture and tourism are two key growth areas for the state.

Investment in these areas is guided by:

- AgriVision 2050 – setting a target for growing the value of the agriculture sector in Tasmania tenfold to \$10 billion per year by 2050.
- Tourism 21 – guiding the Tasmanian Government and tourism industry's work to fulfil major goals for Tasmania's visitor economy by the end of 2020. These goals include attracting 1.5 million visitors each year, \$2.47 billion in visitor spending annually, delivering more direct and indirect tourism employment in Tasmania, sustaining a high level of regional visitor dispersal and achieving greater visitor satisfaction.

With growth in both the state's tourism and agriculture industries, opportunities are increasingly emerging in agri-tourism. This is highlighted in the 2015-16 Tasmanian Agri-Food score card which notes 59 per cent of food produced in Tasmania is sold interstate and to visitors to the state (net sales). During that time, food agriculture in Tasmania accounted for \$1.27 billion gross value at farm gate and non-food agriculture contributed \$220 million.

The 2015-16 scorecard also reports that food and beverage retail sales in Tasmania were worth \$2.482 billion in the reporting period with a further \$770 million worth of sales through restaurants, cafes, pubs, food take-away businesses and other food service outlets.

The emergence and growth in businesses such as cellar doors, farm shops, farmers' markets, craft breweries, and retail outlets at food processing establishments, are an example of the potential for job creation and the direct access to customers and markets that agri-tourism provides.

As well as offering the industry opportunities to engage with visitors and open new markets, agri-tourism is also important for Tasmania's brand and its standing as a premium food producer. Experiences such as food festivals, cellar doors and markets, guided tours of food producers and the self-guided whisky, wine and beer trails, not only support the attraction of visitors to the state, but also have the potential to create a lasting impression and perception of the state as a premium food producer, supporting the growth in the tourism and agriculture sectors.

Following the release of the Agri-tourism Position Paper in 2016 and consultation with the sector, the Tasmanian Government has prepared this draft Strategy to support further growth in the sector and to harness the opportunities agri-tourism offers in the state.

Agri-tourism in Tasmania

While there are events and markets often featured in Tasmania's key urban centres, agri-tourism predominately offers visitors the opportunity to experience the state's regional areas.

In recent years, growth in agri-tourism has been buoyed by growing awareness of premium Tasmanian produce highlighted through achievements such as the global awards received by Tasmanian wine and whisky producers and prestigious national awards for agri-tourism operators. The sector also boosts a number of successful experience trails and guides, many with the support of the Tasmanian Government, including: The Tasmanian Beer Trail, The Tasmanian Whisky Trail, The Tasmanian Wine Trail, The Tasmanian Cider Trail, Cradle to Coast Tasting Trail and the Tasmanian Seasonal Produce Guide (formally the Tasmanian Farm Gate Guide) produced by Fruit Growers Tasmania.

In addition to food tourism, agri-tourism is a key part of Tasmania's high value wine offering. The Tasmanian Wine Trails initiative showcases four regional wine trails plus varietal trails. Wine Tasmania, in partnership with the Tasmanian Seafood Industry Council, also promotes the complementary Tasmanian Seafood Trail.

The three types of agri-tourism offered in Tasmania are:

- **Location based experiences and services**

Common examples are food and beverage based, such as oyster and mussel bars, cellar doors, chocolate and cheese factories, on-farm restaurants, fruit, berry and vegetable harvesting and production tours. There are also many other on-site services on offer, such as:

- non-food experience based options such as horse riding, fishing, vehicles based tours, and open garden tours, displays and designs
- non-food production that may have agri-tourism potential including the production of cut flowers, essential oils, wool, poppy, hemp, pyrethrum and forestry.

- **Non-location based experiences**

Examples of these experiences are cooking schools, camping and fishing trips and charters, tourism and off-road vehicle and cycling tours, cheese and beer making. All these experiences which can be undertaken at a variety of locations across Tasmania.

- **Event based agri-tourism experiences**

Events in regional and central areas include farmers markets, food and beverage festivals, farm gate events and agricultural shows.

The delivery of these agri-tourism experiences are important for both the tourism and agricultural sectors. They are important because the quality and delivery of these products and services have a significant impact on the experience and views visitors hold of the state. Harnessing this opportunity to positively impact 'word of mouth' and the quality of the visitor experience is key to supporting growth and diversification in Tasmanian tourism experiences. Agri-tourism experiences play an integral part in the promotion and protection of Tasmania's brand as a premium food producer.

Agri-tourism offers a different type of experience to others on offer in Tasmania. As well as offering producers and service providers diversification options to broaden their customer base, agri-tourism delivers authentic and 'grass roots' customer experiences, for which there is an increasing demand nationally and internationally.

Consultation

To help shape this draft Agri-tourism Strategy (the draft Strategy), a consultant was engaged to work with key agriculture and tourism industry participants, including conducting over 30 interviews, to understand the challenges and opportunities for agri-tourism in Tasmania. Feedback received following the release of the Agri-tourism Position Paper has also been considered.

The industry representatives that participated in the consultation process included producers, chefs, accommodation providers, event/market organisers and tourism experience providers. The majority of those consulted are long standing, active participants in their industry sectors. Input was also sought from a number of new or emerging agri-tourism participants.

Our approach – supporting growth

The following key focus areas have been identified to contribute to growth in agri-tourism in the state.

Where to go for support

Improving access to information was a key theme raised in consultation with industry participants. The need for information that is accessible and supports an understanding of processes and where to go for support featured in the feedback.

There were three types of information noted during the consultation that industry participants indicated they would like to better understand.

1. Visitor and marketing information including quantitative and qualitative research data around visitor behaviour, demographics, motivations, expectations, attitudes and values.
2. Information regarding compliance and regulations from local, state and federal levels.
3. Where to access available grants, loans and resources.

With agri-tourism bringing together two key sectors, for many business operating in this area, the agri-tourism venture is often part of a broader portfolio, making ease of access to information important. Further, as owner operators and small businesses, agri-tourism operators may have limited capacity to attend events at scheduled times due to operational needs, highlighting that information needs to be available and accessible in a flexible way.

Action – development of an agri-tourism tool kit

The Tasmanian Government has a number of mechanisms in place to support liaison with the business community, such as through Business Tasmania, engagement with the agricultural industry through AgriGrowth Tasmania in the Department of Primary Industries, Parks, Water and Environment (DPIPWE) and in tourism support infrastructure such as funding provided to the four Regional Tourism Organisations (RTOs).

The development of an agri-tourism portal or tool-kit will be explored to provide a central location of information for the industry, which harnesses the capacity, resources and links with existing industry partnerships and engagement tools.

A number of valuable resource tools developed by Government partners currently exist and are readily available via the internet such as the Tasmanian Visitor Survey, Discover Tasmania and Brand Tasmania.

The Tasmanian Government's \$20 million AgriGrowth Loan Scheme provides low interest loans to Tasmanian farm businesses and agri-food businesses including for activities related to agri-tourism. The Program supports, developing an innovative agribusiness initiative that has a long lead time until income is generated, starting a new enterprise or expanding an existing enterprise, or implementing Productivity or Value Enhancement Activities.

Promoting tourism in Tasmania

Through Tourism 21 the Tasmanian Government and tourism industry is aiming to fulfil five major goals for Tasmania's visitor economy by the end of 2020. These goals include attracting 1.5 million visitors each year, \$2.47 billion in visitor spending annually, delivering more direct and indirect tourism employment in Tasmania, sustaining a high level of regional visitor dispersal and achieving greater visitor satisfaction.

Visitors in Tasmania, including Tasmanians travelling in their own state, directly and indirectly contribute around \$2.79 billion or 10.7 per cent to Gross State Product.

Tourism Tasmania's promotion of the state includes the campaign Go Behind the Scenery. Campaign creative developed tells the story of people and place, communicating stories of Tasmania through the lens of our people and their passion for the state. Tasmanian Agri-tourism experiences are well aligned to the Go Behind the Scenery campaign as the sector delivers real experiences, introduces potential visitors to producers, and visualises how and where their products are created.

The latest Go Behind the Scenery campaign (Spring 2017) focuses on food and beverage, showcasing a number of Tasmania's agri-tourism experiences. Typically agri-tourism experiences are located in regional areas. The location of these experiences enables Tourism Tasmania to leverage opportunities by creating awareness of the state's regions and assisting to drive visitation to these areas.

Agri-tourism content is currently featured on the Discover Tasmania and the Go Behind the Scenery websites. Tasmania also participates in Tourism Australia's 'Ultimate Winery Experiences of Australia' program and features agri-tourism experiences for both media and travel trade familiarisation visits.

The Tasmanian Government also established the Great Eastern Drive, to highlight not only the unrivalled coastal views, but the unique agri-tourism experiences offered along the way. It includes the dedicated promotion of food and wine experiences on offer from local growers, producers, winemakers, cheesemakers and chefs.

Action – promote, develop industry capacity and support tourism growth, including agri-tourism, in Tasmania.

The government is supporting growth in Tasmania's tourism industry through Tourism Tasmania's work to promote and market Tasmania as a destination, and through the Department of State Growth's work with the industry to build capacity, identify training needs and support investment in infrastructure and business ventures.

Supporting growth in the agricultural sector

Figures for 2015-16 show that agriculture contributes \$1.485 billion at the farm gate. In the same period seafood production (gross beach value) equates to \$911.4 million. AgriVision 2050 sets a strong target for growing the value of the agriculture sector in Tasmania tenfold to \$10 billion per year by 2050.

The implementation of AgriVision 2050 is supported by AgriGrowth Tasmania in the Department of Primary Industries, Parks, Water and Environment and is focused on providing targeted support to grow Tasmania's agricultural industries.

Action - continue to grow the agricultural sector through AgriVision 2050

The whole of government coordinated effort, support and liaison with industry led by AgriGrowth Tasmania will continue to support the active implementation of AgriVision 2050 informed by industry needs and opportunities.

To support engagement, access to information and transparency, this will include publishing annual updates on the implementation of Tasmania's Sustainable Agri-Food Plan. The Plan was released in 2016 and is the Government's system for sustainably growing the agriculture and food sectors in Tasmania, including seafood.

The 2017 Agri-Food Plan Update will provide a snapshot of work undertaken to:

- improve agriculture policy settings and industry development
- support access to water through streamlined processes and irrigation schemes
- strengthen biosecurity
- support sustainable management of fisheries and aquaculture
- invest in infrastructure, skills development and brand promotion
- invest in education, research, development and work with research partners.

Tasmania's brand

Tasmania is known for its wild places, clean air, premium produce, and as a tourism destination. The Brand Tasmania Council is the custodian of the Tasmania master brand and promotes the advantages of living, working, learning, visiting and doing business in the state. It undertakes considerable promotion of key industry sectors including agriculture, with this work increasing awareness of Tasmanian food and beverage products with consumers and visitors.

At the enterprise level, food and agricultural businesses have used the Tasmanian Brand as a mark of quality that denotes place of origin. It is used to differentiate product in the market, it enables positioning at the high end and in niche markets and generally attracts premium prices.

The Tasmanian Government is currently undertaking its Tasmanian Brand Project, which commenced in 2016.

Action – continue to promote and develop Tasmania's brand

Funding of \$500 00 has been allocated in 2017-18 to continue the Tasmanian Brand Project's focused and differentiated approach to marketing Tasmania as the best place to live, work, visits, invest and raise a family. The Brand project will ensure that all designated high value sectors including agriculture and aquaculture, add value to the competitive advantage that is Tasmania's brand story.

This builds on the work undertaken in 2016-17 to ensure the Tasmanian Brand is nationally and internationally competitive and leveraged to drive economic growth in the state.

Alongside this brand specific work, the other actions identified in this draft Strategy will be key to supporting the quality of visitor experiences that will influence views and branding with regard to the tourism and agricultural sectors in particular, and also the state more broadly.

Facilitating strategic land use

A number of agri-tourism operations begin their life as an on-farm addition which is ancillary to their broader farming practices, such as the addition of a seasonal on-farm stall or farm stay experience. For example, a small on-farm café wanting to grow to meet demand by offering functions or by offering accommodation. The expansion of this use on a working farm must comply with planning regulations, including current planning schemes which vary considerably in provisions and inconsistently apply the two rural zones across the state, and contain unnecessary barriers to the diversification and value adding of agricultural uses.

The government has been undertaking planning reform to ensure planning in Tasmania will be simpler, fairer and more efficient.

The Tasmanian Planning Scheme, which will replace the current 30 planning schemes in the state, has two key parts:

- the State Planning Provisions, which were made on 22 February 2017
- local councils' Local Provision Schedules which apply the State Planning Provisions at the municipal level once approved – these are currently being prepared by councils and will be assessed by the Tasmanian Planning Commission.

The State Planning Provisions are those parts of the Tasmanian Planning Scheme that are common across the state. They include the operational provisions of the planning scheme, zone provisions, code provisions and a set of requirements for the Local Provision Schedules. When developing the State Planning Provisions, the government considered the opportunities available for diversification for agri-businesses and increased the range of uses that can occur alongside farm enterprises. This means that cafes, restaurants, markets and shops if associated with Resource Development or Resource Planning are now permitted uses in Rural and Agriculture zones, and once all Local Provision Schedules are approved, will be consistently applied across Tasmania.

In terms of agri-tourism operations, the Rural Zone has provisions for agricultural uses, as well as a range of other uses which may require a rural location. The Agriculture Zone applies limitations on non-agricultural uses to protect agricultural land from unnecessary conversion. However, opportunities are provided that allow for diversification or value adding. For example visitor accommodation use in a farm house that is a main place of residence is exempt from requiring planning approval. Which is in place now through an interim planning directive that became effective from 1 July 2017.

The Local Provision Schedules will also contain the particular purpose zones, specific area plans and site-specific qualifications for each local council area, which have been approved for unique sites.

Action – continue to implement the Tasmanian Planning Scheme

The Tasmanian Government will continue to work with industry and local councils to implement the Tasmanian Planning Scheme. Importantly this currently includes the application of the State Planning Provisions at a local area level through the Local Provisions Schedules currently being prepared by local councils.

Local Provisions Schedules apply to each municipal area, and include the mapping of zones and overlays and local area objectives and other provisions. While this work will be led by local councils, the government will be actively engaged in this process to support implementation and to provide adequate advice on the application of the State Planning Provisions.

Support industry resilience and capacity building

Agri-tourism is a growing and emerging niche industry bringing together the key primary production capacity of the agricultural sector and the service and experience based tourism sector. Opportunities to engage with the supportive services, programs, networks and infrastructure offered in each of these sectors, such as Regional Tourism Organisations, could be enhanced.

Increasing collaboration within and across these linked sectors will support greater awareness, resilience and capacity building and opportunities for growth.

Action – explore opportunities for cross sector engagement and network development.

The Tasmanian Government will explore its existing industry partnerships, programs and supporting resources and tools to facilitate engagement and harness opportunities for agri-tourism operators through:

- working together
- building awareness
- attracting investment
- integrating activities with the regional structures that support industry development and growth.

Next steps

This draft Agri-tourism Strategy 2017 will be available on the Department of State Growth's website www.stategrowth.tas.gov.au until March 2018.

The input of interested community and direct and indirectly linked businesses and industries is invited to further develop this strategy and inform the Tasmanian Government's work to support and grow the agri-tourism sector.

Written comments and feedback on the draft Strategy should be lodged by Friday, 30 March 2018 by using the online feedback form located at:

http://www.stategrowth.tas.gov.au/home/sectors/cultural_and_tourism_industry/feedback_survey

Or by mail to:

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