

SOUTH AUSTRALIAN
AGRITOURISM
SECTOR PLAN 2025



ACKNOWLEDGEMENT OF COUNTRY

This Plan acknowledges and respects that all tourism activity and development takes place on lands traditionally owned by South Australia's Aboriginal peoples and encourages Aboriginal communities to be a part of the current and future success of the South Australian Visitor Economy.



Above Ngaut Ngaut Conservation Park, Murray River, Lakes & Coorong

Cover Melrose, Flinders Ranges & Outback

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INTRODUCTION

When farmers open up their land, making it accessible to visitors, the merging of these two key industries results in Agricultural Tourism - or "Agritourism".

The National Agritourism Strategy Framework (NASF) was released in late 2022 by Australian Regional Tourism, and aims to support a thriving and diverse Australian Agritourism sector that evolves sustainably and responsibly, is embraced by communities and is loved by visitors.¹

The South Australian Tourism Commission (SATC) recognises the potential of this growing sector and has delivered the *South Australian Agritourism Sector Plan 2025* to create a clear direction for the State and help realise the opportunities for South Australians seeking to tap into this market. This Plan will support new and existing Agritourism opportunities that align with the State's position as a must-visit tourism destination. It dovetails into the NASF and aligns with the *South Australian Regional Visitor Strategy 2025*, which acknowledges the State's emerging Agritourism sector and its growth potential over the coming years.

The SATC sets an ambitious target for South Australia, to grow Agritourism visitor expenditure to \$295 million by December 2025.

Actions delivered in line with this Plan will ultimately support the achievement of the goals outlined in the *South Australian Visitor Economy Sector Plan 2030*, including targets for growing overall visitor expenditure in the State to \$12.8 billion and creating an additional 16,000 jobs.²

THE OPPORTUNITY

Widely recognised for its premium produce, South Australia is well-placed to capitalise on the emerging Agritourism opportunity. Wine is undoubtedly one of those produce items the State has become so renowned for; Adelaide is one of 12 *Great Wine Capitals of the World*, and the only one in Australia. The State produces 50 percent of Australia's bottled wine and around 80 percent of the nation's premium wine. There are 340 cellar doors across the State, many of which have become tourism destinations in their own right.

Of the \$994 million spent on Agritourism in South Australia, \$894 million is spent on Wine Tourism. With visits to wineries and vineyards technically classified as Agritourism (providing an on-farm experience), this puts South Australia at an extraordinary advantage nationally. South Australia has an opportunity to build on its existing strengths, knowledge and global reputation developed in Wine Tourism and apply these learnings to new on-farm products and experiences to tap into the broader Agritourism market. Currently South Australia attracts 10 percent of Australia's farm and farm gate visitors.

While Wine Tourism falls under the umbrella definition of Agritourism, it is out of scope for the purpose of this Plan. Wine Tourism has received decades of industry development support and its tremendous success to date now provides a thriving example for which other producers can aim to emulate through diversification into tourism. In line with the NASF, this Plan will focus on developing opportunities for non-wine producers, specifically, those that generate food, produce and craft.

Further bolstering the State's position to tap into Agritourism, there are strong synergies with South Australia's existing tourism destination brand proposition. Brand pillars such as natural therapy, wildlife encounters and accessible provenance have a natural alignment with on-farm experiences and therefore connect seamlessly with the SATC's marketing priorities.

The SATC's vision is for South Australia to become a world-leading Agritourism destination through leveraging its global reputation for Wine Tourism and establishing new demand driving on-farm tourism products and experiences.

In order to achieve this vision, the following six key objectives need to be addressed:

Marketing – Promote and market Agritourism products and experiences that appeal to South Australia's key domestic and international target markets

Experience & Supply Development – Encourage both public and private investment in new and existing Agritourism products and experiences

Collaboration – Foster strong partnerships amongst primary producers, tourism operators, private investors, industry associations, regional authorities, as well as local, state and federal government departments

Industry Capability – Provide industry capability building opportunities for new and existing Agritourism operators

Leisure and Business Events – Encourage new and existing Agritourism orientated trade and consumer events to be held throughout South Australia

Promoting the Value of Tourism – Demonstrate the value of the visitor economy for those working in the agriculture sector

This Plan aims to provide industry, government and regional stakeholders with a clear understanding of Agritourism and its growth potential in South Australia.

¹ *National Agritourism Strategy Framework 2022*, Australian Regional Tourism

² *South Australian Visitor Economy Sector Plan 2030*, South Australian Tourism Commission



Above Jurlique Farm, Adelaide Hills

BACKGROUND

DEFINITION

Agriculture, or “farming”, is one of Australia’s most significant industries, encompassing the production of crops, horticulture and the rearing of animals to create food and other products. It accounts for over half of the country’s land use.³ Australia is a world-leading exporter of agricultural products, with a strong reputation for delivering clean, green and safe agricultural products across the globe.

Agritourism is defined by Australian Regional Tourism as “a type of experiential travel which connects people to product or produce, delivered on farming land through a direct ‘on farm’ experience”.

An Agritourism experience must:

- ① Combine both tourism and agriculture industries.
- ② Attract on-farm visitors.
- ③ Enable a farmer to increase income or employment through diversification from agriculture to tourism.
- ④ Provide recreation, entertainment and/or educational experiences related to the agriculture enterprise.

A true Agritourism experience must allow visitors to engage with the people or the product from that farm. For the purpose of this Plan, a “farm” can be defined as an area of land or water where agricultural processes take place in order to harvest or create food, crafts or related products. This could include areas of monoculture plantings, native vegetation, aquamarine environments and other dedicated agriculture facilities.

Examples of Agritourism experiences might include:

- Farm tours and demonstrations
- Farm to fork (or ‘paddock to plate’) cooking classes
- Pick your own produce experiences
- Behind the scenes tours
- Experiential farm stays (B&B, camping, etc.)
- On-farm dining, cultural or educational experiences
- On-farm events (weddings, conferences, etc.)
- On-farm retail outlets

Agritourism can also be supported by off-farm tourism; however, this is out of scope for this Plan, and not included in the definition. Examples of **off-farm** tourism products may include:

- Dining on local produce
- Produce-based itineraries and trails
- Provedores and farmers markets
- Regional events
- Regional accommodation

SOURCE: *National Agritourism Strategy Framework 2022*, Australian Regional Tourism

³ *Snapshot of Australian Agriculture 2023*, Department of Agriculture, Fisheries and Forestry

Agritourism offers an opportunity for producers to diversify their traditional farming operations by offering a tourism product or experience, resulting in a variety of potential benefits:



INCOME

Attracting new markets/income streams to support business sustainability.



JOBS

Creating new jobs and encouraging families to stay on the land; supporting succession planning.



PRODUCTIVITY

Activating underutilised spaces and buildings on the property.



CONNECTION

Fostering connection to the community and visitors; reducing feelings of isolation.



STORYTELLING

Sharing stories about regional Australia and its farming culture.

AUSTRALIAN REGIONAL TOURISM - NATIONAL AGRITOURISM STRATEGY FRAMEWORK

Recognised nationally as a growing sector, Australian Regional Tourism released the *National Agritourism Strategy Framework* in late 2022, which identifies six priority areas:

- Sustainable & inclusive farm diversification,
- Community capability and capacity building with a focus on regional employment,
- Develop new, high quality, distinctly Australian agritourism experiences,
- Promote the sector responsibly, with an alignment to food and drink,
- Encourage genuine collaboration and enduring partnerships, and
- Provide leadership to support growth.

This Plan dovetails into the National Framework, aligning with key definitions and objectives.

AUSTRALIA'S POSITIONING AND MARKETS

Agritourism is worth **\$17.4 billion** to Australia's economy, with **\$7.4 billion** of that attributed specifically to visits at farms or farm gates, and the remainder to Wine Tourism.

AGRITOURISM

\$17.4 B 15.6 M

Total Value Visitors

WINE TOURISM

\$10 B Value 10.4 M Visitors

OTHER FARM TOURISM

\$7.4 B Value 5.2 M Visitors

SOURCES:











National Agritourism Strategy Framework 2022, Australian Regional Tourism
National and International Visitor Surveys 2019, Tourism Research Australia and BDA Marketing and Planning













Above The Dairyman Barossa, Barossa

There are existing synergies with Australia's agriculture export and tourism source markets, meaning that there is already a level of awareness amongst these key global populations for both Australia's produce and tourism offering.

Australia's top 10 export markets
(as at Dec 2019)

NO . 1	China	
NO . 2	Japan	
NO . 3	USA	
NO . 4	Indonesia	
NO . 5	South Korea	
NO . 6	India	
NO . 7	Vietnam	
NO . 8	New Zealand	
NO . 9	Hong Kong	
NO . 10	Singapore	

Australia's top 10 international tourism source markets
(as at Dec 2019)

NO . 1	China	
NO . 2	UK	
NO . 3	USA	
NO . 4	New Zealand	
NO . 5	Japan	
NO . 6	India	
NO . 7	Singapore	
NO . 8	South Korea	
NO . 9	Hong Kong	
NO . 10	Malaysia	

SOURCE: *National Agritourism Strategy Framework 2022*. Australian Regional Tourism

In a post-pandemic environment, people around the world are seeking opportunities to spend more time outdoors, support local businesses and connect with others.⁴ Consumer preferences and demands continue to evolve, particularly around factors such as environmental sustainability, therefore experiences that can preserve regional landscapes and lifestyles have become increasingly important. Agritourism experiences can help meet the needs of these changing visitor expectations, as they provide an opportunity to connect people with nature and with the place their produce comes from. They also enable opportunities to promote or educate about the importance of ethical and sustainable farming practices (e.g. a behind-the-scenes tour of an organic and biodynamic farm) or opportunities to give back to the community (e.g. a farm which operates as a social enterprise). These types of trends are clearly evident when looking at Tourism Australia's key target audience, the High Yield Traveller, who is seeking authentic experiences that offer an opportunity to immerse themselves in the local culture and natural environment. In addition, Tourism Australia's secondary audience, the Working Holiday Maker, disperses further into regions and plays a significant part in filling seasonal jobs and skills shortages in both agriculture and tourism.⁵ Within these two specific market segments, the types of visitors who are likely

to participate in Agritourism have an interest in farming practices and/or consider on-farm experiences to be a family-friendly sensorial way to connect with animals and food.⁶

Collectively, Agritourism experiences based around food, produce and craft offer broad appeal across many of Australia's target markets. Wine Tourism, a specific subset of Agritourism, has limited appeal amongst non-drinking cultures predominant in some key markets. Meanwhile, Aquaculture (e.g. oyster harvesting), another niche area under the Agritourism banner, is appealing mostly to South East Asian markets.⁶

The table detailed in Appendix A identifies the percentage of each international market's appeal for three types of Agritourism experiences, as determined through Tourism Australia's *Future of Demand* project.

⁴ *National Agritourism Strategy Framework 2022*, Australian Regional Tourism

⁵ *South Australian International Marketing Strategy 2025*, South Australian Tourism Commission

⁶ *Future of Demand 2022*, Tourism Australia



The data in Appendix A shows that nearly a quarter of international markets, from a variety of countries, find winery stays an appealing experience. Comparatively, the demand for farm experiences (e.g. farm gate tours, farm stays, pick your own produce) is much higher on average, and then higher again when looking at most Asian markets. Whilst Aquaculture experiences (e.g. oyster, pearl and fish farms) are very appealing for some markets, they are notably less appealing to others, including some of Australia's more traditional, Western Hemisphere markets. Each of these Agritourism segments are most appealing across high-yielding audiences and Working Holiday Maker markets.⁷

Visitors who find Agritourism appealing are also interested in Aboriginal craft-based experiences, local cooking classes and birdwatching. Land-based farm experiences, in particular, appear to attract those wanting to stay overnight in an agricultural region or with locals, and who are more interested in ecotourism. This represents a good opportunity for package and itinerary creation, supporting collaboration with businesses that do not offer a direct on-farm experience.⁷

The obvious appeal for these experiences, in combination with the alignment to Australia's target markets, positions Agritourism as an obvious demand driving growth sector, with visits to farms and farm gates, alone, expected to grow to \$18.6 billion by year 2030.⁸

GROWTH FOR FARM & FARM GATE VISITS

\$7.4B	↗	\$18.6B
2019		2030

This growth potential poses an incredible economic boost to regional communities via direct expenditure, whilst creating new income and employment opportunities for farmers. Economic benefits are often the most desired impacts of regional tourism developments, as there are very obvious contrasts between thriving and declining regional areas, but it is important to recognise that the potential benefits of this industry are multifaceted. There are also potential environmental benefits to be realised, should farmers align to the values of Australia's key target markets: such as pursuing regenerative agriculture or establishing conservation projects on their farming land, for example. Through sustaining the local economy and environment, Agritourism can also help to minimise the decline of rural communities and offer a platform for producers to share their stories steeped in Australian history and culture. Although social and environmental impacts are more challenging to measure, they arguably offer a longer lasting and more meaningful impact on Australia's farming communities and the generations that follow.

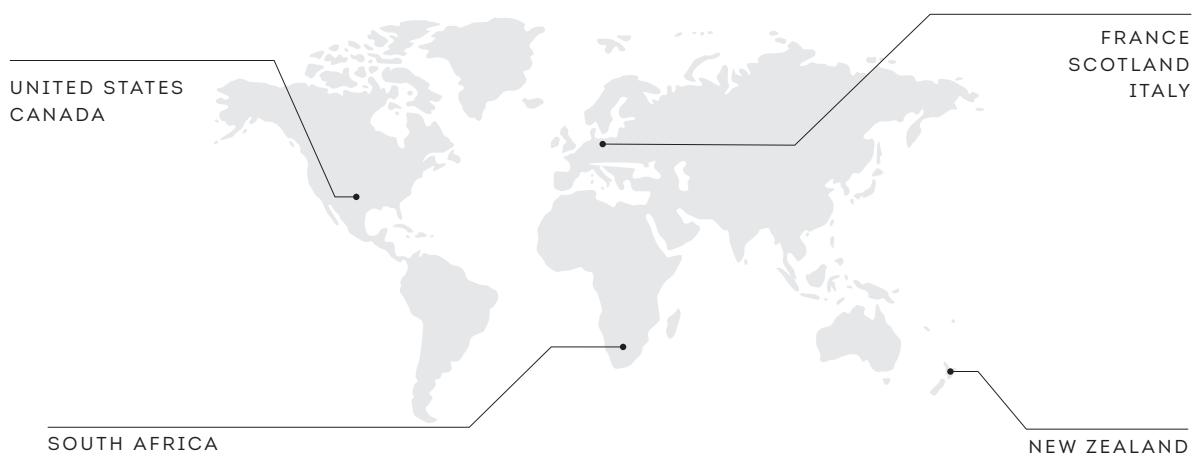
⁷ *Future of Demand 2022*, Tourism Australia

⁸ *National Agritourism Strategy Framework 2022*, Australian Regional Tourism

COMPETING DESTINATIONS

Agritourism is a growing sector globally, gaining more recognition for its potential to highlight sustainable tourism in rural areas. Almost every tourism destination has an opportunity to develop an appealing Agritourism sector, however several destinations are already very active in this space, with various government led plans and initiatives aimed at growing the industry already in action. Some globally significant Agritourism destinations that Australia might compete with for market share can be seen via the map below.

GLOBALLY SIGNIFICANT AGRITOURISM DESTINATIONS



ITALY

The origin of the word 'Agritourism' is thought to originate from Italy. Commonly referred to as 'Agriturismo', Agritourism has developed across the Italian countryside and now takes place at over 20,000 operating farms. The values of Italian Agritourism have been regulated by national law since 2006, and encourage:

- New agritourism developments,
- Diversification of income streams for farmers,
- Sustainability of resources and conservation of the landscapes,
- The promotion of farm produce, culture and related traditions, and more.

SOURCE: Agriturismo Italia 2023

Italian Agritourism delivers a complete yet simple rural experience, and must take place on a farm and be delivered by a farmer. Over the past three decades, Italian farmers have been able to lean on Agritourism as a way to preserve historic buildings and traditional agriculture, particularly in mountainous areas which are difficult to cultivate and develop mass-production operations. Agritourism in Italy favours small-scale farms and integrates with the appeal of nearby natural attractions and proximity to cities rich in art and history. Italy remains a leading example of what Agritourism can do for rural communities, with many regional specialties distinctly aligned with the place it was originally or authentically produced (e.g. white truffles from Alba/Piedmont, Parmigiano Reggiano from Emilia Romagna, limoncello from Amalfi Coast/Campania).



SOUTH AUSTRALIA'S AGRITOURISM INDUSTRY

OBJECTIVES

The SATC's vision is for South Australia to become a world-leading Agritourism destination through leveraging its global reputation for Wine Tourism and establishing new demand driving on-farm tourism products and experiences.

In order to achieve this vision, a number of key objectives need to be addressed concurrently, as identified on the next page.





Marketing

Marketing bodies need to promote awareness of the State's Agritourism products and experiences to markets that will find these activities appealing. The SATC targets a mixture of domestic and some international markets, sharing synergies with Tourism Australia's target markets. Agritourism products can be used to drive demand amongst high yielding and Working Holiday Maker market segments.



Collaboration

Proactive collaboration is critical to support capability and capacity building across the sector, as well as to support policy changes and leverage investment opportunities. Agritourism operators can share learnings and cross promote as a way to support each other and foster a positive network.



Leisure and Business Events

Business and leisure events act as triggers to convert travel bookings. On-farm events are considered Agritourism products, however event managers can also deliver off-farm events, which showcase and celebrate Agritourism, as a way to drive visitation to regional areas at particular times of the year (e.g. harvest festivals). Events can offer a marketing platform to reach new audiences and may encourage visitation to farms at a later time. Agricultural industry focused events, whereby international producers are invited to experience harvesting or production on South Australian farms, could also be used as an opportunity to showcase South Australian regions as appealing tourism destinations.



Experience and Supply Development

Operators and stakeholders will need to continue to invest into new and existing Agritourism products and experiences to grow the competitiveness of this sector. It is important to meet or exceed the expectations of visitors, and continue to develop the quality of experiences, accommodation and other Agritourism products that match the State's positioning as a premium destination.



Industry Capability

New and existing operators will need access to training, award programs and accreditation systems tailored for this sector. Areas for capability development may include refining business operations or systems, adopting new technologies and meeting the ever-evolving expectations of visiting markets. Producers who are new to tourism may require more support to prioritise the business development actions required to fully activate the tourism side of the business.



Promoting the Value of Tourism

It will be essential for producers and regional communities to understand the value of the visitor economy. Agritourism cannot be delivered without the buy-in from those working in the agricultural sector, and therefore it is imperative that tourism opportunities and possible benefits for farming businesses are conveyed in a way that is easy to interpret and through the correct channels. The visitor economy can attract young workers, new ideas and skills to regions, and rural communities will likely be more welcoming of visitors if they can appreciate the flow-on sustainable benefits for local businesses, services, and the population.

POSITIONING AND MARKETS

The *South Australian Regional Visitor Strategy 2025* acknowledges the emerging Agritourism sector in South Australia and its growth potential over the coming years.⁹ Renowned for its production of premium produce, and existing high profile Agritourism products (such as Jurlique, Beerenberg, oyster farm experiences, etc.), South Australia is well-placed to capitalise on the emerging Agritourism opportunity.

When comparing the international markets being targeted through the *South Australian International Tourism Strategy 2025* and the *South Australia Food and Beverage 5 Year Export Strategy 2022*, there is some alignment, with a number of countries identified as priority markets for both strategies:

United States of America	
New Zealand	
Singapore	
Malaysia	
Hong Kong	
Japan	
China	
South Korea	

While each of the State's international target markets have had some engagement with visiting farms or farm gates, there is some disparity between the markets that have identified Agritourism as an appealing experience, versus actual visitation to date (refer to Appendix A).

For example, while people from Thailand, Philippines, Vietnam, India and Singapore reportedly find farm and aquaculture experiences appealing, the level of Agritourism specific visitation is relatively low. Comparatively, markets such as Germany and South Korea show a lower than average appeal for these types of experiences, whereas the visitation is higher than average. Markets such as Hong Kong, Malaysia and Indonesia demonstrate that Agritourism is appealing through a high level of visitation.

Whilst the disparity between the appeal and visitation could be put down to demand changes spurred on during the global pandemic, it is possible that the markets who find Agritourism appealing with low

visitation aren't aware of local Agritourism products, or that the supply of Agritourism products did not meet the requirements of these markets (e.g. accessibility, availability, type of experience).

Further to internationals, South Australia targets interstate and intrastate (or South Australian) audiences as a key demographic. SATC's domestic target market is typically a professional urban female with a household income over \$100k, who is aged 25-54 and interested in food.

The COVID-19 pandemic resulted in some outstanding intrastate and day trip visitation throughout South Australian regions. It is important to maintain this market by offering reasons for them to return to the State's regions, which could be through the development and marketing of new family-friendly Agritourism experiences.

'Accessible Provenance' is one of SATC's marketing brand pillars, and is a term which encompasses wine regions, food & drink experiences, and destination dining. Agritourism can easily be promoted under this banner and help to reinforce the State's position as an appealing tourism destination. Content which promotes opportunities for visitors to immerse themselves in an on-farm experience will have broad appeal across SATC's international and domestic target markets.

Amongst interstate audiences, South Australia is well-known for delivering 'Good Food & Wine' however, there is room to further the State's reputation as the country's leading premium produce and good food provider by continuing to grow exposure for food and produce related visitor experiences.

53%

of interstate travellers associate South Australia with Good Food & Wine (second to Victoria, also at 53%)¹⁰

⁹ *South Australian Regional Visitor Strategy 2025*, Regional Visitor Strategy Steering Committee

¹⁰ *Quarterly and Communication Tracker December 2022*. Blue North Survey produced by BDA Marketing and Planning

Wine Tourism

Wine Tourism accounts for **\$874 million** of Agritourism's **\$994 million** value in South Australia ¹¹, and whilst visits to wineries/vineyards are technically classified as Agritourism (providing an on-farm experience), this Plan aligns to the NASF, focusing primarily on producers of food, produce and craft. Given decades of invested interest, the development of strong support structures, and tailored State and Federal

funding programs, Wine Tourism in South Australia has flourished and it provides an excellent example that the broader Agritourism industry can seek to follow.

Across the page are some examples of key learnings that South Australian Wine Tourism operators might be able to share with their Agritourism counterparts.

¹¹ BDA Marketing and Planning 2019



Industry Networks

Several areas of the wine industry's legislation and administration fall under the remit of Primary Industries & Regions South Australia (PIRSA), while development of the sector continues to be led by the industry's peak body, the South Australian Wine Industry Association (SAWIA), with support from regional grape and wine associations. At a national level, Wine Australia also provides industry development training, funding and opportunities. Each of these bodies actively share tourism opportunities with their winemaking members, fostering a strong network and streamlined communications, while interchangeably meeting the needs of the businesses as both producers and Wine Tourism operators (i.e. winery stays, cellar doors, etc.).

Risk Management

Inviting visitors to a place of production attracts inherent risk. Not only are there safety risks for the visitor (e.g. trip hazards), and risks of distraction or disruption of production workers, but there are also biosecurity risks. A notable risk that the South Australian wine industry has been able to mitigate is the introduction of Phylloxera, a pest which feeds on the roots of grapevines, and is responsible for wiping out vineyards across the globe. Approximately 75 percent of the State's vines could die within just six years if infested. Many winemakers have implemented safeguards to prevent contamination, such as erecting signage to encourage uninvited visitors to keep away from the vines and providing shoe covers or washing facilities for guests.

Market Diversification

Cellar doors attract visitors – often to the place of production (i.e. vineyard and/or winery) – which assists in diversifying the wine brand's market, thus creating new sales leads and exposure for their product. Cellar doors enable a direct point of sale for the consumer, and can support in minimising potential risk factors associated with relying heavily on domestic distribution and/or international export. Direct customers provided many wineries with much needed cashflow during the very disruptive COVID-19 pandemic.

Quality Experience Offering

Wineries have grown with their customer's needs, and many have come to realise that visitors often want more than to just taste the wine they produce. Visitors are wanting to learn about the wine and how it's made from a credible source (ideally the winemaker). There is also a growing movement towards pairing wine with tasting plates to help enhance the flavours of the wine on offer. Many South Australian cellar doors have moved to bookable experiences, or paid wine tastings at the least. This ensures not only that the business is recouping the costs of product samples, but it also allows for improved resourcing and staffing. A dedicated staff member and space set aside for pre-booked customers allows for an improved visitor experience, which results in better wine sales, wine club membership sign ups and word of mouth referrals.

It is evident that South Australia's Wine Tourism sector is booming, despite the disruptions of COVID-19. South Australia can lean on its reputation as a premier wine region and encourage wine enthusiasts to consider adding another type of Agritourism product to their itinerary. As per the infographic below, visits to wineries makes up the majority of the State's current Agritourism visitation.

AGRITOURISM

\$994 M 2.3 M
 Total Value Visitors

WINE TOURISM

\$874 M Value 1.9 M Visitors

OTHER FARM TOURISM

\$251 M Value 536 K Visitors

SOURCE: National and International Visitor Surveys 2019, Tourism Research Australia and BDA Marketing and Planning



Sector Relevance

Alongside Wine Tourism, Agritourism shares synergies with other sectors that South Australia can exceed at, and those which the SATC is actively seeking to grow.

Wellness Tourism

The SATC's *Wellness Tourism Action Plan 2025* identifies Agritourism, including farm stays, paddock-to-plate dining, produce farm tours, cooking classes, and engaging with premium producers, as appealing experiences for Wellness Travellers. These visitors are travelling for the purpose and pursuit of maintaining and enhancing one's personal health and wellbeing. Connecting with others, nature and where their food comes from is of high appeal to this sector.

Aboriginal Tourism

Aboriginal Tourism involves interaction with Aboriginal peoples, communities, sites, or artefacts via a tourism product that presents the culture, heritage, and traditions in an authentic manner. The SATC's *Aboriginal Tourism Action Plan 2025* identifies the need to grow the supply of demand driving Aboriginal Tourism experiences to market to both domestic and international audiences. As the oldest living culture in the world, and the traditional custodians of the

land, Aboriginal people can offer a unique viewpoint and learnings for visitors around sustainable harvesting practices used to create different foods, products and crafts. Agritourism may provide another platform for Aboriginal people to share their stories, and open up new opportunities to collaborate with producers interested in diversifying their monoculture style farms.

Further to this, the SATC is developing a strategy that consolidates sustainable tourism development opportunities, with an aim for South Australia to become a global leader in sustainable tourism. South Australia is already recognised as a leader in sustainability and decarbonisation, and there is an opportunity to extend this leadership into tourism through developing tourism products that promote and support the sustainability of the State's natural environment and culture. Agritourism supports the preservation of farming culture in rural communities and can encourage farmers to adopt new environmentally sustainable initiatives (e.g. regenerative agriculture, establishing conservation areas, renewable energy sources) to meet the expectations of their visitors.

GROWTH FOR FARM & FARM GATE VISITS IN SOUTH AUSTRALIA

\$251 M

2019



\$295 M

2025

South Australia currently attracts 10 percent of Australia's farm and farm gate visitors, and is setting an ambitious goal to grow this to 12 percent, worth \$295 million in Agritourism related expenditure by year 2025. In order to be considered a leader in Australia, and the world, it is important for South Australia to grow its share of Agritourism visitors. South Australia can build on its reputation for delivering and exporting world-class premium produce, and actively promote how easily accessible many of the State's farms and farmers are - with a diverse range of producers located within close proximity of Adelaide and key access infrastructure (e.g. airports, ports, arterial roads). To generate new demand for Agritourism in the State, it will be essential to enhance existing products or experiences, elevating them to meet the needs of current markets, while simultaneously encourage investment into new products and build industry capability for South Australian primary producers considering tourism diversification. The availability and promotion of demand driving Agritourism products and experiences will help to boost the visitation of key markets throughout South Australia. A situational analysis outlining key strengths and opportunities, in contrast with weaknesses and threats, for the development of the Agritourism sector has been outlined in Appendix D.



TOURISM PRODUCT DEVELOPMENT

The Tourism and Agriculture industries collectively make up almost a quarter of South Australia's businesses, and represent nearly 10 percent of all jobs. In 2021, there were 17,088 agriculture, forestry and fishing businesses in South Australia¹², however there are currently only 519 South Australian Agritourism operators listed on the Australian Tourism Data Warehouse (ATDW), including 392 wineries with cellar doors. Conversely, **there are 127 South Australian Agritourism businesses with 158 Agritourism products listed on the ATDW**, representing a clear opportunity to grow the number of listings for producers who generate an alternative food, product or craft. It is likely that there are a number of Agritourism operators who have limited awareness or engagement with tourism industry standards, and therefore their business is not being captured through the ATDW.

The range of products that can be showcased via an Agritourism experience are limited only to whether it is created or harvested from the place where the visitor can engage with the product (and/or the people behind it). Some examples include, but are in no way limited to:

FOOD

Learn where food comes from, pick or make your own edible produce.

- Tractor tours through crops and farming land
- Pick your own fruit
- Milk the cows and make your own cheese
- Shuck oysters fresh from the lease
- Learn how to collect honey and tend to bees
- Native bush foods foraging tour

PRODUCT

Discover iconic landscapes and learn about the processes required to create products that are not intended for consumption.

- Sheep shearing demonstrations
- Distill botanicals to create essential oils
- Biodynamic and regenerative farming practice talks
- Meet and ride horses at a stud farm
- Sustainable tree plantation tour
- Photography tour through scenic canola fields

CRAFT

Browse and purchase artisan crafts made from agricultural products and by-products via the farm shop; or participate in an on-farm workshop and learn from the maker.

- Beeswax candle making
- Basket weaving
- Natural perfumery
- Wool spinning and scarf making
- Woodwork and carving
- Leather belt making

¹² Region Summary: South Australia 2023, Australian Bureau of Statistics

Enhancing Existing Agritourism Products

There are a number of existing demand driving Agritourism experiences which could continue to be promoted under SATC's Accessible Provenance marketing pillar. Some examples are listed below:

- **Farm tours and demonstrations** – Jurlique Farm, Smoky Bay Oyster Farm Tours, Softfoot Alpaca Farm, Tamasey Farm, Echo Farm, Humpalicious Camel Farm
- **Farm to fork (or 'paddock to plate') cooking classes** – Penobscot Farm/Watervale Hotel, The Farm Eatery
- **Pick your own produce experiences** – Beerenberg Farm, @Lenswood, Harvest the Fleurieu, Harrisville Orchards
- **Behind the scenes tours** – Emu Ridge Distilling, Paracombe Premium Perry, Lessismore Farm, KI Living Honey
- **Experiential farm stays (B&B, camping, etc.)** – The Dairyman Barossa, Redwing Farm, Hutton Vale Farm, Rawnsley Park Station, Chowilla Station
- **On-farm dining, cultural or educational experiences** – Bungaree Station, Mayura Station, Yarnbala
- **On-farm retail outlets** – Clifford's Honey Farm, Brayfield Lavender, Lyndoch Lavender Farm, Papershell Farm, Robe Dairy
- **On-farm events** – Peninsula Providore, Alma's Hem, Anlaby Station, The Apple Farm

Some South Australian Agritourism products are already of a national standard, offering an immersive experience, strong online presence and connections into the tourism distribution system. There may be scope to support these businesses to enhance their offering through tweaking the visitor experience to make it more appealing to different types of markets, investing in new infrastructure or equipment, refining business operation models, and connecting in with the different networks or opportunities available to them.

Existing products and experiences could tap into current marketing efforts which actively promote Agritourism, such as produce trails. There is an opportunity to capitalise on the SATC's branded road trips, especially the Epicurean Way and the Seafood Frontier, which highlight premium produce. These road trips were designed based on the natural themes of tourism products and attractions in the area, suggesting that there is a cluster of Agritourism products already existing along these trails.

Further, there is opportunity to leverage other existing marketing efforts which are proactively promoting Agritourism products and experiences, such as:

CHERRIES SA MAP

Fruit Producers of SA members produce an annual map detailing pick your own and 'shed door' (or 'farm gate') seasonal experiences for visitors.

cherriessa.com.au

STATION STAYS SA

A significant and successful marketing initiative, this is a collaboration between pastoralists who have come together under the Station Stays SA umbrella. Established in 2009, there are now 26 pastoral properties within the collective, all of which are situated within South Australia's Flinders Ranges and Outback tourism region.

stationstayssa.com.au

PICK A PINK LADY

The Pick a Pink Lady event is held in May each year and invites visitors to Adelaide Hills farming properties to pick apples and meet the growers.

pickapinklady.com.au

Creating New Agritourism Products

There is potential to create a variety of new Agritourism products amongst producers seeking to diversify into tourism, as well as an opportunity to support businesses with an existing Agritourism product to grow and expand their offering. There is a broad range of products and experiences that operators could create, so long as it takes place on a farm and the product (or process of production) is authentic to the people and place that it is being delivered.

Appendices B and C detail South Australia's agricultural regions and products, which can be used as a base to create new Agritourism products and experiences. Businesses may like to consider creating a new product related to one of the below categories:

- Farm tours and demonstrations
- Cooking classes which incorporate an on-farm experience (i.e. 'farm to fork', 'paddock to plate', 'catch and cook')
- Pick your own produce experiences
- Behind the scenes tours
- Experiential farm stays (B&B, camping, etc.)

All South Australian regions have the option to leverage this growing sector, however there may be scope to prioritise regions that are already engaged and proactive in this space. Agritourism is seen as a particular opportunity within the Adelaide Hills, Clare Valley, Yorke Peninsula and Murray River, Lakes and Coorong tourism regions, which have all identified an objective to grow this sector through the *South Australian Regional Visitor Strategy 2025 (RVS)*. The recognition of this sector throughout the RVS consultation demonstrates that these particular regions likely have an existing network of engaged farming and/or Agritourism industries.

While a large variety of products can be showcased through an Agritourism offering, it is likely that smaller producers who are less commodity driven may be able to diversify quicker and easier than some mass production farms.

The *NASF* identifies that on-farm experiences can take between three to five years from concept through to launch phase, meaning that the actual products developed in the wake of this Plan may not be realised until 2026 and beyond.



COMPETITOR ANALYSIS

Arguably, every destination across the world has a potentially compelling Agritourism industry. Each of these destinations will likely find success in agricultural industries that are authentic to the area's landscape, history and/or culture. In order to compete with other Australian states and territories, South Australian producers will need to lean into nuances within the local history and/or culture, but most importantly, the product(s) that their landscape specialises in. Aside from wine, South Australia's share of legumes and oilseeds production is proportionally higher than other states, suggesting that there may be a niche area to work with here.

However, each South Australian region specialises in a variety of products, so there is potential to grow types of Agritourism authentic to the region or local area, rather than focusing on the State as a whole. The types of visitors coming to South Australia who are interested in Agritourism will expect a quality immersive experience. Therefore, South Australian Agritourism operators can aim to compete on any type of product or experience, so long as it is immersive, authentic and delivered to a high standard.

The Farm at Byron Bay

There are a large number of Australian Agritourism products, however a leading example for South Australian operators to look to for inspiration is The Farm at Byron Bay. This 80-acre working farm is home to a community of growers, producers, eateries and educators who use traditional and sustainable farming methods. The Farm is home to pigs, cattle, chickens and produce gardens which are all showcased onsite through various outlets including a restaurant, produce store, bakery and florist. Visitors can engage with the product and place via workshops, farm tours and guided animal interactions.

SOURCE: thefarm.com.au/

CONCLUSION

Agritourism is a growing sector in Australia, and South Australia has an extraordinary advantage to leverage the tremendous success built in Wine Tourism to develop new on-farm products and experiences, and realise the potential in the broader Agritourism market. South Australia is not only the nation's 'Wine State', but it has a strong network of agriculture - with farming a major employer and exporter for South Australia. On top of this, Agritourism's synergies with the State's existing tourism destination brand proposition (brand pillars such as natural therapy, wildlife encounters and accessible provenance) further strengthen South Australia's position to tap into the Agritourism sector, worth \$17.4 billion in Australia. Growing the value of Agritourism will result in improved regional economies and provide sustainable environmental and social benefits for rural communities.

This *South Australian Agritourism Sector Plan 2025* aligns with the *SA Visitor Economy Sector Plan 2030* through supporting the establishment of new on-farm tourism products and experiences which appeal to the State's key target markets. South Australia can leverage its most prominent primary production industries, such as legumes and oilseeds, or showcase products authentic to specific regions. While Wine Tourism remains under the umbrella of Agritourism, the outcomes sought by the implementation of this Plan focus on the development of food, craft and other produce.

This Plan sets an ambitious target of growing Agritourism visitor expenditure to \$295 million by December 2025. It aims to provide industry, government and regional stakeholders with a clear understanding of Agritourism and its growth potential in South Australia. It will be integral for all levels of stakeholders to acknowledge the opportunity that Agritourism presents and enable farmers to build their capacity and capability to deliver on tourism initiatives. A list of potential stakeholders can be found in Appendix E.

The South Australian Tourism Commission has a vision for South Australia to be a world-leading Agritourism destination and thus grow the State's share of farm and farm gate visitors. Through applying the knowledge and strengths developed in Wine Tourism, South Australia has an unparalleled opportunity to establish new on-farm tourism products and experiences that build on this reputation and appeal to the State's key target markets. The SATC will use this Plan as a basis to create an internal action plan, and encourages other stakeholders to develop their own list of actions that can help to support the growth of the Agritourism sector in South Australia.



Above Aggie's Fresh Fruit Stall, Riverland

A: AGRITOURISM APPEAL VS. VISITATION

TOURISM AUSTRALIA TARGET MARKET	FARM EXPERIENCE APPEAL RATE	AQUACULTURE EXPERIENCE APPEAL RATE	WINERY STAY APPEAL RATE	FARM/ FARMGATE VISITS IN SA
Global Average	33%	20%	24%	
United Kingdom	22%	15%	23%	17%
Germany	20%	16%	23%	26% ↑
Italy	28%	13%	23%	12%
France	20%	11%	9%	14%
New Zealand	22%	18%	27% ↑	10%
US	21%	16%	29% ↑	19%
Canada	19%	14%	28% ↑	19%
Singapore	48% ↑	25% ↑	25% ↑	22%
Malaysia	41% ↑	25% ↑	35% ↑	27% ↑
Hong Kong	44% ↑	26% ↑	25% ↑	37% ↑
China	38% ↑	19%	13%	32% ↑
India	35% ↑	28% ↑	21%	17%
Japan	16%	11%	20%	14%
Vietnam	49% ↑	29% ↑	17%	19%
South Korea	25%	7%	25% ↑	37% ↑
Taiwan	47% ↑	19%	37% ↑	42% ↑
Indonesia	45% ↑	28% ↑	15%	30% ↑
Philippines	43% ↑	30% ↑	25% ↑	19%
Thailand	44% ↑	22%	24% ↑	18%
AUSTRALIA	26%	18%	32%	

KEY:

↑ Higher than average appeal amongst this market

SOURCES:

Future of Demand 2022, Tourism Australia
International Visitor Survey 2019, Tourism Research Australia



B: AGRICULTURAL PRODUCTS

With nearly 47 percent of South Australia's land mass used for agriculture,¹³ it is no wonder that the State is responsible for delivering a wide variety of premium products.

South Australian produce is recognised as being grown using clean soil, water and air. The State's major export products include:

Grains

i.e. wheat, barley, pulses, canola

- 4,500 grain farms in SA
- 8.4 million tonnes of grains harvested, producing 5.5 million tonnes of food grains
- 80% of SA's grain harvest is exported to over 60 countries

\$2.4 B \$5.6 B

farm gate value revenue

INDONESIA, CHINA, EGYPT
top export markets

Meat & Livestock

i.e. wool, eggs, pork, beef, lamb, chickens

- 26% of Australia's pork production
- 16% of Australia's sheep flock
- 18% of Australia's chickens
- SA is a leader in the development of undomesticated meat industries (e.g. camels and kangaroos)

\$2.9 B \$4.0 B

farm gate value revenue

USA, CHINA, SOUTH KOREA
top export markets

Wine

- 680 wineries with 340 cellar doors
- 3,250 grape growers produced 570 million litres of wine
- 50% of Australia's bottled wine, and 80% of the country's premium wine
- Adelaide is the Great Wine Capital of Australia

\$ 622 M \$ 2.4 B

farm gate value revenue

UK, USA, SINGAPORE
top export markets

Horticulture

i.e. almonds, citrus, potatoes

- 1.2 million tonnes of fruits, nuts and vegetables produced
- 80% of Australia's fresh washed potatoes
- SA is the only fruit fly free state on Australia's mainland

\$1.5 B

farm gate value

\$ 2.0 B

revenue

CHINA, JAPAN, NEW ZEALAND
top export markets

Dairy

i.e. fresh/long-life/powdered milk, ice cream, cheese, yoghurt, butter

- 490 million litres of milk produced from 64,000 cows
- 40% is sold as fresh milk
- 10,000 tonnes of cheese produced

\$263 M

farm gate value

\$ 690 M

revenue

INDONESIA, CHINA, THAILAND
top export markets

Seafood

i.e. Southern Rock lobster, Southern Bluefin tuna, abalone, oysters, prawns

- 73,000 tonnes produced
- Number of licence holders in SA:
 - 243 rock lobster
 - 14 Southern Bluefin tuna
 - 44 abalone
 - 340 oyster
 - 52 prawn

\$406 M

farm gate value

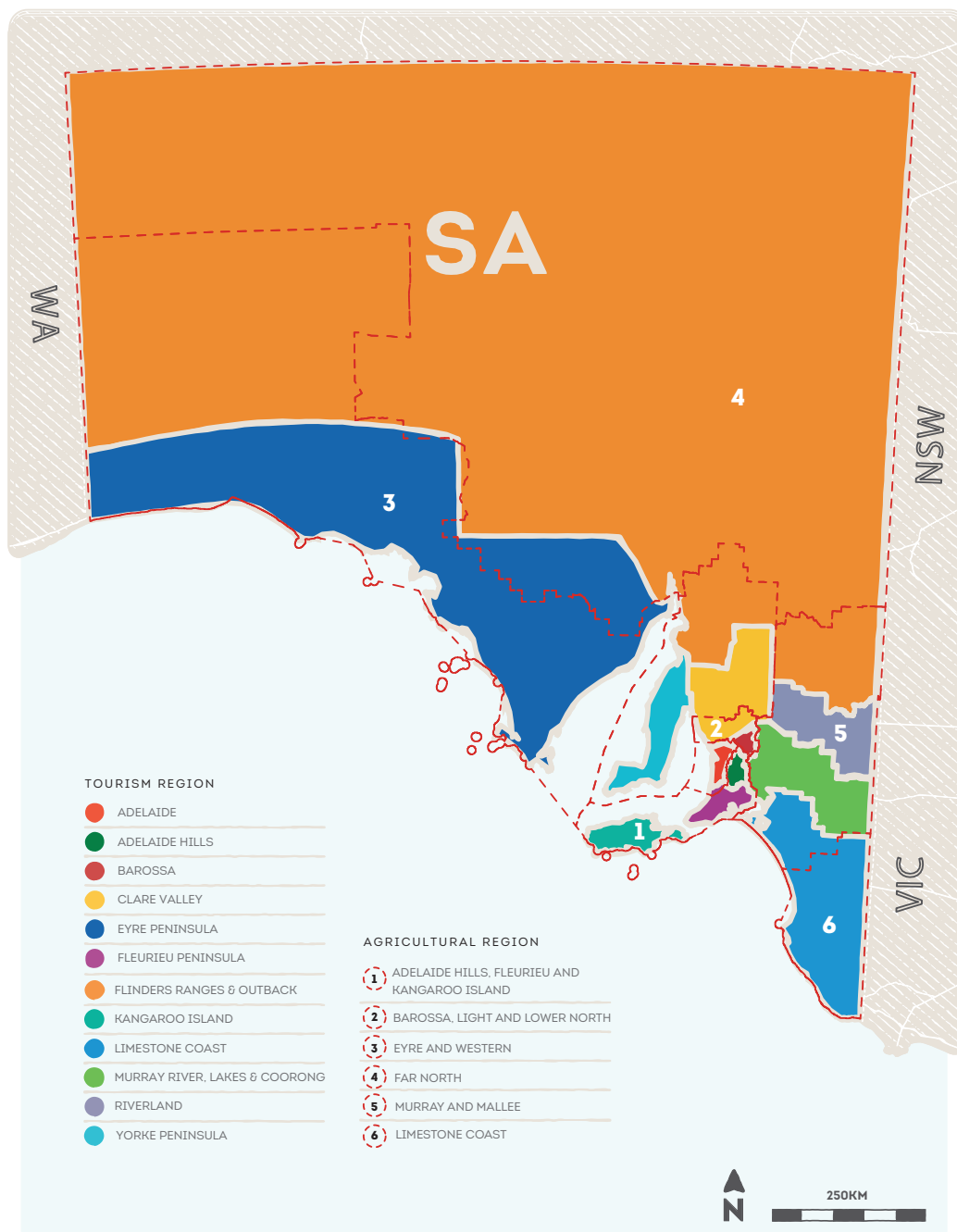
\$ 457 M

revenue

JAPAN, HONG KONG, USA
top export markets

C: AGRICULTURAL REGIONS

Primary Industries and Regions South Australia (PIRSA) and Regional Development Australia (RDA) recognise six regions, in addition to Adelaide. Each of these regions are renowned for producing their own specialised products. Some products may have high production or export value but are not widely recognised as being a regional speciality. This may be due to a range of factors such as lack of product marketing/awareness, the product becoming unidentifiable due to being mixed with other supplies along the supply chain, or perhaps due to direct consumers not finding the product appealing or valuable. Regions should focus on their strengths by aligning Agritourism developments with their local area's key productions and exports, while considering what types of experiences visitors might find appealing when engaging with the product or the people behind its creation.



Adelaide Hills, Fleurieu and Kangaroo Island

Collectively, these three areas offer a highly diverse economy, with strong tourism, agriculture and food & wine processing industries. This region offers the most significant contribution to the State's tourism economy and employment. Conversely, Agriculture is the largest single employer on Kangaroo Island, with the sector generating more than 25 percent of the Island's total economic output. This region could focus Agritourism developments on horticulture, dairy or the world's only source of pure Ligurian bee honey.

8,663 KM²



98% of SA's berries



90% of SA's apples

\$5.92 B

gross regional product



32% of SA's dairy cattle



The world's only source of pure Ligurian bee honey

Barossa, Light and Lower North

This highly productive agricultural region offers an increasingly premium high-tech horticulture industry. The Barossa Valley wine region and some of its wine brands are internationally-recognised. Aside from continuing to leverage its established Wine Tourism industry, this region could focus Agritourism developments on fruit & vegetable manufacturing and egg production. There is also an opportunity to lean into the strong German heritage of the region, exploring traditional farming methods from the region's settlement days.

3,145 KM²



46% of SA's egg production by value



16% of SA's fruit and vegetable products manufactured

\$3.96 B

gross regional product



38% of SA's wine and spirits manufactured

Eyre and Western

South Australia's Eyre and Western region features a highly diverse economy with strong manufacturing, aquaculture, agriculture, mining and tourism industries. Eyre and Western is home to several significant places, including Port Lincoln which is known as 'Australia's Seafood Capital' (and home to one of the largest fishing fleets in the Southern Hemisphere), and major export ports at Whyalla, Port Bonython, Port Thevenard and Port Lincoln. The region also offers world-class renewable energy resources, farming wind, solar, wave, biofuels and hydrogen. This region can continue to leverage its reputation for seafood, encouraging further Aquaculture diversification around the farming of finfish (particularly tuna), oysters, mussels and abalone. There is also opportunity to diversify crop farming, particularly wheat, barley and oilseeds.

234,937 KM²

\$4.1B

gross regional product



24% of SA's barley crop and
40% of the State's wheat
crop

SA's largest grain exporter



82% of SA's seafood product
exported globally

Far North

The Far North region is a major source of South Australia's mineral wealth, with most of the State's copper, gas and uranium mining taking place here. The region is also home to a large renewable energy industry (e.g. solar, wind, geothermal) and offers a strategic transport hub in Port Augusta, commonly referred to as the 'cross roads of Australia'. This region, which takes up 80 percent of South Australia's land mass, can continue to focus its efforts on encouraging visitors to stay overnight on pastoral land. The Outback is an iconic international tourism destination, and examples such as Anna Creek Station, the world's largest working cattle station (24,000 km²), offer a truly unique Australian Agritourism experience.

799,850 KM²

80% of SA's land mass

\$4.191 B

gross regional product



Large pastoral properties

SOURCE: Regional Summaries
Infographics, Department of Primary
Industries and Regions South Australia

Murray and Mallee

With one-fifth of this land mass used for cropping, the Murray Mallee showcases innovation and leadership in water use efficiencies. The region offers a diverse economy, with strong agriculture, manufacturing, tourism and health industries. It is home to major abattoirs, food processors and the largest winery in the Southern Hemisphere (Berri Estates).

Colloquially known as the 'Food Bowl of South Australia', this region is the State's biggest wine grape producer, responsible for 57 percent of the State's annual grape harvest and 25 percent of Australia's annual grape crush. The Murray and Mallee region as a whole has many Agritourism opportunities outside of Wine Tourism, particularly through its abundance of oranges, almonds, vegetables and pig farming.

36,489 KM²



100% of SA's oranges



24% of SA's vegetable production

\$3.9 B

gross regional product



42% of SA's pig production



95% of SA's almonds

Limestone Coast

The Limestone Coast is well-renowned for its agriculture, forestry and fishery industry - the region's largest employing sector, and responsible for twenty-four percent (24%) of the State's output in this area. There is potential to develop a wide variety of Agritourism products in this region, leaning into its production of crops, forest plantations, and premium beef and dairy. The region's coastline is also a habitat for Southern Rock lobsters, which is a hub for commercial fishing resulting in one of the State's most highly sought-after premium global exports.

21,000 KM²



31% of SA's beef



83% of Australia's Lucerne seed production

\$3.91 B

gross regional product

300 million litres of milk produced (60% of SA's output)



83% of SA's forestry and logging output

Yorke Peninsula and Mid North

The Yorke Peninsula and Mid North is responsible for 20 percent of the State's agriculture, forestry and fishing output, supported by a strong manufacturing industry. The region also produces 70 percent of the State's wind energy capacity. The Yorke Peninsula and Mid North offers strong Agritourism potential, particularly in areas such as grains, legumes, chicken and pig farming.

35,035 km²

\$3.884 B

gross regional product



23% of SA's poultry output



70% of Australia's legumes



42% of SA's grains output



20% of SA's pig production

SOURCE: *Regional Summaries Infographics*, Department of Primary Industries and Regions South Australia



Above

Redwing Farm, Yorke Peninsula



D: SITUATIONAL ANALYSIS

Harnessing new opportunities comes with a new set of risks, so before investing time and resources into growing Agritourism, it is important for all stakeholders (refer to Appendix E), especially farmers and producers, to consider the strengths, weaknesses, opportunities and threats of developing the Agritourism sector.

STRENGTHS

- Agritourism is a growing global trend and is currently worth \$17.4 billion to Australia's economy, with \$7.4 billion of that attributed specifically to visits at farms or farm gates
- Australian Regional Tourism has a dedicated Agritourism Framework, encouraging collaborative efforts to grow visits to farms and farm gates to \$18.6 billion by year 2030
- There is good international market awareness of both Australian tourism and agriculture exports
- South Australia has a strong primary industry sector, with 17,088 farming properties
- A variety of demand driving Agritourism experiences already exist in South Australia (e.g. Jurlique, Beerenberg and oyster farming)
- Agritourism aligns to SATC's existing brand pillar of Accessible Provenance and is appealing to the State's target markets
- There are existing marketing platforms that Agritourism operators can leverage, such as produce trails
- Producers looking to diversify into tourism can take learnings from the well-established Wine Tourism industry
- Reinforcing the messaging behind Agritourism's conservation benefits will support South Australia's position as a sustainable tourism destination
- There are strong synergies between Agritourism and SATC's focus on developing Wellness and Aboriginal tourism products, allowing for improved efficiencies with both operator engagement and promotions to consumers
- Agritourism traditions are influenced by a variety of indigenous, early settler and contemporary cultures, providing a platform to share authentic regional stories in meaningful ways
- Small producers are likely to be more accessible and appealing for target markets, which will help to support the sustainability of small and family businesses

WEAKNESSES

- The definition of Agritourism can vary, creating uncertainty, and potentially confusing the message for the industry and consumers alike
- There isn't one peak body representing Agritourism in South Australia, however there are many membership-based associations in agriculture and others in tourism, which may present conflicting priorities for producers
- Inconsistent regulations across local governments may lead to conflicting interpretations and variable operating models in different areas
- Small and family businesses may not have the time or resources to understand approval processes or conditions, nor the ability to develop favourable business proposals to meet these regulatory requirements
- Regulations that need to be met in order to establish an Agritourism business can be complicated and expensive for businesses to navigate
- Farmers will need to bear the costs (and allocate time/resources) associated with planning, compliance, regulatory fees and new business requirements to transition into tourism
- Producers don't traditionally need customer service, event planning, or marketing skills to run their farms, meaning that there is likely a gap of skills when transitioning to tourism
- Significant modifications to production or operations may be required in order for producers to make it safe to welcome visitors on to their working farm
- Large-scale and certain types of productions may be less appealing for visitors and/or difficult to modify in a way that provides a suitable space to welcome visitors (e.g. abattoirs, cropping header)
- Given seasonality of different products, there is potential that the visitor experience may need to be adapted throughout the year
- There are limited investment opportunities for small infrastructure builds, and there is not currently a dedicated Agritourism fund available through State or Federal Governments
- Some farming communities may be unaware of the visitor economy and its benefits
- Agritourism operators and supporting businesses in the area will need to understand the needs of any new visiting markets to assure customer satisfaction and return visitation
- Access to some farmland may be challenging for visitors due to lack of signage and sealed roads
- South Australian export produce falls under the 'Made in Australia' brand, meaning that some international markets may not be aware of the State's premium produce offering

OPPORTUNITIES

- Farming communities can diversify into tourism as a way to bolster their income and employment opportunities, retaining more workers in the area and supporting a sustainable and vibrant community lifestyle
- A thriving regional area is a desirable place to live, work and visit, which may assist in growing and sustaining rural populations
- New job opportunities and employment pathways may prove appealing for women and younger generations who are typically drawn away from rural areas for employment prospects
- Viable business models which spread potential risks across both agriculture and tourism industries may be more appealing for the next generation of farming families to take over, supporting succession planning
- The next generation is demanding purposeful jobs which create positive social, environmental and cultural impacts, and Agritourism diversification has the potential to meet these needs
- Allowing locals to express their culture through Agritourism will create a sense of empowerment and pride, while leading to the preservation of such cultural elements
- Producers facing unviable times can use tourism diversification as a way to keep their land in agriculture, and therefore minimising the risk of social decline in the area
- The local community will have more opportunity to learn about where their food comes from and may have increased choices to purchase fresher, tastier and more nutritious foods, resulting in a healthier population
- The local environment could benefit through Agritourism diversification projects, particularly those which include an element of environmental conservation or sustainability
- Agritourism can be used to showcase and sustain regional farming traditions
- Farmers can use Agritourism to activate spaces and buildings on their properties that are currently underutilised
- Producers can grow the market for their products by attracting direct customers to the farm
- South Australia can lean on its existing image as a premium wine producing destination, and use this exposure to increase awareness about Agritourism products in the area
- Agritourism experiences can be used to create demand amongst emerging markets for regional areas
- Agritourism is an appealing sector for Working Holiday Makers, which can help two-fold, by driving visitation and expenditure for the Agritourism product/experience, but also by meeting a critical issue of filling job capacity in regional areas
- Producers who are able to diversify their markets, relying less heavily on export, can help to improve resilience in the local economy and negate some impacts of global financial issues
- New partnerships across tourism and agricultural industries could support stronger local supply chains
- Through local distribution of produce, food and crafts, there are existing networks to promote relevant on-farm experiences to visitors (e.g. showcasing goods through regional dining restaurants, farmers markets, providores, etc.)
- There is good potential for tour, attraction and accommodation operators who don't offer an on-farm experience to leverage off this sector through packaging, regional events/promotion and product clustering (e.g. trails)
- Those travelling for Agritourism products will likely require a range of supporting experiences and visitor services (e.g. accommodation, petrol stations, information centres), providing more benefits to the visitor economy as a whole
- Government regulatory bodies could streamline processes and allocate dedicated case managers for farmers to enable quicker reviews and approvals, and less paperwork
- There may be future potential for farmers to access grants from multiple government agencies, given Agritourism sits across two key economic sectors (primary production and tourism)

THREATS

- The lack of migrants and Working Holiday Makers in South Australia could continue to impact on the availability of skilled workers for primary producers, limiting capacity to grow the tourism side of the business
- Other destinations may develop a directly competitive Agritourism offering, limiting South Australia's potential share of visitors travelling for these experiences
- Farmers may not be able to access the capability development opportunities required to diversify to a quality standard
- Poor delivery of Agritourism experiences could have a negative impact on South Australia's position as an appealing tourism destination, as well as reflect badly on the community or product being showcased
- Inauthentic or alternative products which are not technically classified as 'Agritourism' may promote themselves to Agritourism visitors, creating confusion amongst the audience and potentially distorting the destination's brand proposition
- Opening up farming properties to visitors increases biosecurity threats, such as Foot and Mouth Disease and Fruit Fly
- Climate change could impact on production, limiting the type or amount of produce for visitors to engage with
- Highly sought-after regional specialties could become scarce due to over consumption by visitors, driving the prices up and making it less accessible to the local community
- Monoculture farmers may feel pressured to follow trends and diversify into unfamiliar/low yielding/complex types of food production to meet the different demands of visiting markets
- With such strong appeal for the Agritourism sector, it will be important to ensure that the industry grows at a sustainable rate and does not result in negative impacts often associated with mass tourism to small communities
- Regulatory challenges might act as a barrier for farmers to diversify into tourism
- Regulation processes can be long and potentially delay implementation of projects, particularly innovative proposals
- Telecommunication blackspots in regional areas may act as a barrier for more farmers to improve their digital capability, as well as potentially reducing the appeal of the destination for some visiting markets

E: STAKEHOLDERS

In order for South Australia to cement its position as a world-leading Agritourism destination, it will be essential to ensure that a wide range of tourism, agriculture, and regional economic bodies collaborate to share opportunities, overcome challenges and represent the Agritourism agenda across all relevant policy areas. The below list is not intended to be an exhaustive list, but rather an indication of the variety of goals and values at play within the realm of Agritourism.

GLOBAL AGRITOURISM NETWORK (GAN)

GAN was established by leading Agritourism scholars and practitioners in 2023 with an aim to enhance the capacity of Agritourism stakeholders worldwide. The network involves all Agritourism stakeholders, including farmers & agricultural producers, researchers, educators, community planners, government entities, agricultural service providers, development organisations, tour operators, hospitality operators, event planners and others. Australia and New Zealand is represented via a Regional Committee.

AUSTRALIAN REGIONAL TOURISM (ART)

ART is the peak body representing regional tourism practitioners, with a mission to develop regional Australia through building competitive tourism. On behalf of its members, ART promotes sustainable regional development through regionally focused research, destination management planning, product development, marketing and the development of skilled human resources. ART delivered the *National Agritourism Framework Strategy* in late 2022, alongside an action plan and toolkit documents for both local government areas and farmers.

WORLD WIDE OPPORTUNITIES ON ORGANIC FARMS (WWOOF)

WWOOF is a global organisation which links volunteers with organic farmers and growers to promote cultural and educational experiences, helping to build a sustainable worldwide community. Volunteers are able to travel Australia and volunteer their time and labour for up to 38 hours per week, and in return they will receive meals and board which is provided by the host family. WWOOF Australia is able to support volunteers with extending working holiday visas through some of its programs, making this an important organisation for Working Holiday Makers to be aware of.

TOURISM AUSTRALIA

Tourism Australia is the Australian Government agency responsible for attracting international visitors to Australia, both for leisure and business events. The organisation is active in 15 key markets through activities such as advertising, PR & media programs, trade shows & industry programs, consumer promotions, online communications, and consumer research. Tourism Australia launched the *Future of Demand* consumer research report in December 2022, which identified Agritourism as a demand driving experience, detailing appeal for on-farm, aquaculture and winery stay experiences.

REGIONAL DEVELOPMENT AUSTRALIA (RDA)

RDA is a national network of committees made up of local leaders who work with all levels of government, businesses and community groups to support the development of their regions. The RDA informs implementation of government programs, policy, campaigns, and grant funding/investment opportunities. The RDA network shares information and collaborates to identify issues, opportunities and challenges, as well as develop innovations and solutions that can be adapted across Australia's regional economies. The RDA program is administered by the Department of Infrastructure, Transport, Regional Development, Communications and the Arts. There are eight South Australian RDA bodies (including metropolitan Adelaide), all of which are funded by the Australian, South Australian and local governments that they represent. A number of RDA bodies have agricultural, tourism and/or agritourism projects that they are leading within their communities.

DEPARTMENT FOR AGRICULTURE, FISHERIES AND FORESTRY (DAFF)

DAFF is the lead Federal Government agency responsible for enhancing agricultural industries and trade, and managing the threat of biosecurity risks to Australia. DAFF focuses on being future ready to drive outcomes for their stakeholders, allowing them to remain competitive and sustainable. The Department provides grants, investment, financial assistance and tax concessions. DAFF also manages the Biosecurity Australia website.

SEAFOOD INDUSTRY AUSTRALIA (SIA)

SIA is the national peak body representing the Australian seafood industry, with members from the wildcatch, aquaculture and post-harvest areas of the industry. The association has a vision to support a united, effective and respected seafood industry, with a mission to promote, protect and develop the industry at an international level. Further to SIA, a new Seafood Industry South Australia group is currently being established.

NATIONAL FARMERS' FEDERATION (NFF)

NFF is the peak national body representing farmers and agriculture across Australia. Since 1979, NFF has been dedicated to the advancement of agriculture through identification, development and achievement of policy outcomes affecting farmers. The Federation is made up of a range of committees, targeting issues such as climate & energy, economic policy, farming systems, sustainable development, telecommunications & social, trade, water, and workforce.

REGIONAL TOURISM ORGANISATIONS (RTOS)

South Australia has 11 RTOs that operate separately to the SATC. Each RTO is governed and funded differently, with several funded through RDA and/or local councils. Some RTOs are membership based. Each RTO offers a local contact person which businesses can connect with to identify local opportunities that connect in with broader regional, state and national tourism opportunities.

TOURISM INDUSTRY COUNCIL SOUTH AUSTRALIA (TICSA)

TiCSA is the not-for-profit peak membership body aimed at creating a unified voice on the issues and opportunities facing its 1000 members and the broader tourism industry. Aside from advocacy, TiCSA provides its members with business development, networking, and training programs. TiCSA are proactive in delivering Agritourism-themed workshops for their members.

THE SOUTH AUSTRALIAN FORESTRY CORPORATION (FORESTRYSA)

ForestrySA is a plantation and community forest manager. As a plantation manager, their focus is on the production of logs which other businesses turn into a range of timber products. The Corporation is also responsible for over 16,000 hectares of protected native forest located in the Mount Lofty Ranges and Limestone Coast areas, which are widely used by the community for recreation.

LOCAL GOVERNMENT AUSTRALIA OF SOUTH AUSTRALIA (LGA SA)

LGA SA is a membership organisation which provides quality service and leadership to meet the needs of its member councils. It does this through supporting and guiding its members on issues such as procurement, training, web solutions, human resources, wastewater management, risk & liability, and emergency events. LGA SA also represents its 68 member councils in matters affecting South Australian councils and their communities. Local councils are heavily involved in the tourism diversification process for farmers, providing the approvals and permits required to enable infrastructure developments, re-zoning parcels of land and the ability to operate a food business.

PRIMARY PRODUCERS SA COUNCIL (PPSA)

PPSA is a membership body representing the interests of the State's six primary production sectors (dairy, grain, horticulture, wine grapes, livestock and forest products). And is the South Australian member of the National Farmers' Federation. PPSA partners with government and industry to develop policies and programs to promote the sustainable delivery of primary production in the State.

THE DEPARTMENT OF PRIMARY INDUSTRIES AND REGIONS (PIRSA)

PIRSA is a key economic development agency with the aim to advance the prosperity and sustainability of South Australia's primary industries and the liveability of regional communities. The Department delivers on this through ensuring sustainable use of agricultural and aquatic resources, leading or influencing policy & regulatory frameworks, as well as through supporting producers by facilitating connections, information sharing and the mitigation of industry related threats.

FOOD SOUTH AUSTRALIA (FOOD SA)

Food SA is an independent, industry-led membership-based organisation representing food and beverage manufacturing companies. Their mission is to support and sustain the State's food and beverage industry, through offering its members the opportunity to grow their business, markets, connections and voice. Food SA manages the South Australian Premier's Food and Beverage Industry Awards program, as well as the Eat Local SA and I Choose SA campaigns.

In addition to the above stakeholders, there is a wide range of regulatory bodies that producers will need to engage with in order to receive the required approvals and permits to operate. These may include, but are in no way limited to Consumer and Business Services, SA Water, Department for Infrastructure and Transport, SA Health, Department of Treasury and Finance, Department of Environment and Water (DEW), Return to Work SA and Safework SA. Further, there are a range of tourism industry training providers that may be able to support ongoing business capability support initiatives.



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