



Ideas from Thinkbank 2019

Our Place in the Sun: Harvesting Tasmania's Agritourism



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About Tasmanian Leaders and Thinkbank 2019



Thinkbank 2019 participants

Tasmanian Leaders is a not-for-profit leadership development organisation established in 2007, dedicated to enhancing the social and economic vibrancy of Tasmania.

Our activities are in two main areas. The first area is our leadership development programs and courses, including the annual flagship Tasmanian Leaders Program (TLP). Others include the Industry Leadership Enterprise and Development program (I-LEAD), targeted courses for Tasmanian regions and a range of specialist short courses to meet demand.

The second area of our operations is less about program delivery and more about addressing key issues for the State. Using the unique resource of the Tasmanian Leaders network and alumni we bring together people to grapple with issues of significance. Thinkbank is a key part of this endeavour where we seek to contribute analysis, strategy and policy development to inspire change.

Tasmanian Leaders is pleased to announce that we are now working jointly with *Tasmanian Way* to provide another avenue for the collective network to make plans and find solutions for Tasmania.

Small business has become a particular focus for Tasmanian Leaders and more specifically through I-LEAD and Thinkbank. This year the focus is Agritourism 'Our Place in the Sun', and last year Thinkbank 2018 focussed on small business more generally.

Thinkbank is a process that is tailor made for each topic. This year it has three components:

Informal research.

Each participant contacted a number of agritourism organisations to develop an understanding of the range of challenges and opportunities they have. Suggested questions and areas of thinking were provided to participants, but the approach was not prescriptive. Indeed, a variety of approaches to gathering information from the informal research were undertaken which enriched the process, our learning and the results.

Participants were also tasked with contacting an agritourism operator in another jurisdiction to identify what formal strategies exist for agritourism in that region, state, province or country.

Thinkbank event.

Held at the Stanley Seaview Inn on 27-28 October 2019, the format allowed for the discussion of various experiences in agritourism. Time was spent sharing approaches to the informal research and what worked best for what reasons. Of six areas identified for improvement, three were discussed in more detail, and a large part of the event was devoted to analysis and recommendations for action in these areas.

Spreading the word.

The Thinkbank process is about creating change and having an impact. A range of interested parties was identified who would be contacted by a Thinkbank participant and offered a meeting to discuss the process, the document and the outcomes. These contacts include businesses of all sizes – specifically agritourism businesses – governments at all levels, educational institutions,

professional associations, media organisations and interested individuals.

'Our Place in the Sun' is also a key part of the 2019 Tasmanian Leaders Premier in Conversation event held with our alumni.

We believe that Thinkbank is a vital part of the analysis of issues and planning for change in Tasmania. We will continue to enjoy working with people in our own network and across other networks throughout Tasmania to maximise benefits for the State.

As 2020 begins we welcome the opportunity to work with other interested parties and organisations to design and deliver a Thinkbank process on their chosen topic, as well as delivering our annual Thinkbank on a topic of our choosing.

I would like to thank the Thinkbank 2019 Design Group of Frances Pratt, Sam Ibbott, Fiona Kerslake, Coco Cullen-Knox, Brian Lewis and Andrew Pitt for their work on design, facilitation and document production.

*Rob Woolley
Chair, Tasmanian Leaders
December 2019*

Thinkbank participants identified their appreciation for being involved in a group and process that will have a positive contribution to the vibrancy of agritourism in Tasmania.

Executive summary



The 2019 Thinkbank event ‘Our Place in the Sun’ brought together alumni from the Tasmanian Leaders Program and I-LEAD (a Tasmanian Leaders program for small businesses) to explore key areas of opportunity for the agritourism sector in Tasmania.

The event was held over two days in Stanley, a town nestled in Tasmania’s agricultural North West, providing inspiration for the event. This year’s Thinkbank had a number of aims:

- To help agritourism operators start, build or improve agritourism organisations, products and services through sharing experiences and practical ideas

- To invigorate and energise those working in agritourism
- To build agritourism networks nationally and internationally at a business to business level
- To demonstrate the value of the Tasmanian Leaders network in building Tasmania’s social economic vibrancy.

Prior to the Thinkbank event each participant was asked to undertake interviews with Tasmanian agritourism businesses and collect information regarding agritourism policy and activities in another world region. The interviews gathered information such as the nature of the business, reasons for entering agritourism, some of the biggest successes and challenges, lessons

learned and advice for others, and what the interviewees would do if they had a magic wand.

Analysis of the interviews identified that support was critical to both success and overcoming challenges.

This support encompasses the notion of being a part of an agritourism community, peak bodies for marketing, collaboration and sharing ideas, training programs in business development and growth and grant opportunities. Similarly, the importance and usefulness of collaboration between agritourism businesses was highlighted throughout the interview responses. This included sharing learnings, promoting opportunities and building a network of attractions for visitors.

During the event six areas of opportunity were identified for improvement, of which three were chosen to be considered more deeply. Participants split into groups to define the issues and develop possible solutions in one of the following areas of opportunity::

- 1 Building resilience
- 2 Improving industry collaboration
- 3 Understanding the market

Agritourism presents an enormous opportunity to add value to the Tasmanian brand and socio-economic vibrancy of the State however it was acknowledged that Tasmania lacks a clear vision and strategy. The challenge now is how to continue supporting the existing sector and maximise the potential of an emerging and undeveloped sector. To harness the opportunity and build resilience the sector needs defining, measuring and programs to support it that are underpinned by clear goals and targets to promote sustainable agricultural and tourism practices.

Formal and informal industry collaboration structures have the potential to address many of the issues that limit success of the agritourism sector. At the state level, government is the key actor to facilitate support mechanisms such as conferences, training and handbooks and courses, grants, and insurance to support locally led events, and marketing. At the regional level it is recommended that Regional Tourism Organisations ensure representation of the agritourism sector on boards and in Destination Action Plans, and support local groups via mapping of agritourism operations, planning, provision of advice and funding for collaborative marketing, provision of quality control, and organisation of regional events.

Understanding the market is vital for current and potential businesses, and groups supporting the sector, in order to flourish. As the current available data is not 'fit for purpose' there must be engagement with experts (i.e. Tourism Tasmania

and the University of Tasmania) to collaborate on the collection of the data regarding agritourism in Tasmania. Data collection may include, but is not limited to; places visited; experiences undertaken; expectations upon arrival; budget/spend capacity; accommodation; transport; activities and food; origin of visitors; how visitors find providers; and the size of the agritourism businesses. In order to do this it is suggested that interested businesses, and other potential collaboration and mentor groups create an agritourism focus/advocacy group. Promoting and encouraging the availability and use of this information is also highlighted.



Interviews with Tasmanian agritourism businesses

One business interviewed during the informal research said they “couldn’t believe that anyone would be that interested in them and their business, and want to help.”

Thinkbank participants undertook 41 interviews of Tasmanian agritourism businesses. The themes identified under each heading are in order of most to least frequent.



Nature of the business

The majority of the agritourism businesses interviewed hired 1-10 staff with some having 11-20 and a couple with 21-30 and 31-40 staff. The majority of businesses had cropping as a component of its agriculture operation, followed by livestock. Others included aquaculture and commercial fishing. The most common tourism components included; café/restaurant; accommodation; cellar doors; education; farm tours/farm experience; food stalls; and an historic property.

The majority of businesses interviewed started from agriculture and moved into agritourism with a handful starting both agriculture and tourism components of the business simultaneously. Agriculture was often the greater portion of the business, however, while tourism might have been developed secondary it was common to now be the more profitable side of the business.

Most of the businesses interviewed were profitable with fewer not. Most businesses had just one location, but some had two. Tourism was generally part of the business plan from the beginning for a couple of the interviewees but agriculture always came first.

Reasons for moving into agritourism

The primary reasons for most interviewees to move into tourism was to promote the product brand and value-add/diversify the business. Other reasons included educating the public about farming; minimising the feeling of isolation; and providing a new career or interest on the farming property.

“We have a product which we believe has integrity. Interacting with both locals and visitors about our product and being advocates for small-farm Tasmanian produce is immensely enjoyable.”

Biggest successes

Interviewees identified the following as some of the biggest successes in their agritourism business venture:

- Achieving business growth and building the business from scratch
- Being recipients of grants and awards
- Holding major events that help their business and other agritourism businesses
- Producing a quality product
- Receiving public recognition and visibility
- Developing personal connections with visitors
- Undertaking international marketing initiatives
- Contributing to the community.

Reasons for success

Interviewees identified the following as some of the reasons for success in their agritourism business:

- Support from either government or non-government programs and grants
- Strategic marketing
- Producing a quality product and ensuring a point of difference
- Having a strong drive and work ethic
- Collaboration with other businesses
- Having a location that is good for both tourism and agriculture.

“The licencing section of the Tasmania Government was incredibly helpful with any licencing requirements. The Business Enterprise Centre has also been great in the past and that helped us to engage with someone to do a strategic plan. They also provided the right contacts, and right assistance with the right background.”

“Staff issues are incredibly difficult; they need to be a jack of all trades.”

Challenges

The most frequently identified challenges included:

- Difficulties finding and retaining good staff, often due to a remote location
- Large workloads trying to balance the time given to both sides of the business
- Finance, including seasonality and cash flow through winter and contingency planning
- Red tape, for example gaining approval for signage, planning approvals and the perception that fees are paid for similar activities across multiple government departments
- Skills and knowledge in both agriculture and tourism
- Business development and management skills in addition to being proficient in both tourism and agriculture
- Disconnect between marketing organisations from the business and their needs
- Remoteness and lack of infrastructure.

Greater support was also identified as necessary, such as government programs to assist in the early stages of development. Having access to more capital and time was a key requirement identified if businesses were to develop any new ideas, such as expansions, restaurants, accommodation and interpretation centres.



“Start working with the tourism authorities early, network a lot, and try and keep an eye on what style of tourism experience they’re favouring.”

“The best advice would be that the more homework you do, the less stumbling you do. Talk to people, talk to mentors. There has also been very minor benefits from joining regional, local and state tourism organisations, awards and winning awards; but great benefits by working collaboratively with other agritourism businesses in terms of promotion. Too many in the industry are more worried about what their peers think than what their customer thinks.”

Learnings and advice

Sage advice was provided for those considering agritourism. Comments include:

- Ensure market research is undertaken
- Talk to lots of people, build relationships with government departments and local councils, find good mentors
- Provide an authentic experience
- Provide a quality product, value for customers and be innovative
- Work hard
- Undertake strategic marketing
- Take calculated risks and undertake risk management
- Develop business slow and steady
- Enjoy what you do
- Integrate with the local community
- Operate with integrity
- Outsource what you can’t do or identify when you need help
- Stick to your business plan
- Collaborate with other agritourism businesses
- Have a mechanism for ongoing customer connection
- Understand the importance of word of mouth
- Maintain majority ownership, grow slowly and stay true to yourself
- Make the most of opportunities and resources (i.e. government support programs)
- Be adaptable
- Customers can be challenging
- Do not choose a product with a short shelf life
- Do not rely on grants
- Ensure tourism and farm operations are compatible
- Have second income in start-up years
- Location is important
- Make any product for customers to take with them
- Minimise overheads
- Develop management skills
- Record business trends
- Maintain a small supply chain
- Understand all regulations
- It is useful to have other attractions in your vicinity
- Winter is difficult.

“I had written a sign in Chinese that I thought said ‘lobster’. However, tourists kept laughing at the sign until I had a tour guide tell me it said ‘red transporter’. The tour guide told me that tourists would prefer authenticity.”



Magic wand

If interview participants had a magic wand they would:

- Get more support for business development
- Have more money and time to grow the business
- Improve infrastructure including phone reception and access (roads, flights and Spirit of Tasmania)
- Encourage Tasmanian government and other tourism businesses to produce high class products rather than attract mass cheap tourism.

Interviewees identified that they would like to see further development of the State's agritourism trails, with greater coordination and collaboration between businesses and more educational material such as interpretive centres.

Conclusions

The agritourism businesses interviewed for this research were incredibly generous in sharing their stories. They provided learnings and advice that spoke of the importance of enjoying what you do, of local community, customer focus, authenticity and taking a risk. Other practical business tips were also offered, such as having products that are easy to take away and not relying on grants, all of which highlight the importance of industry collaboration to build the sector.

The tourism component of many of these operations is becoming the most profitable side of the business, however agriculture still lies at the core. A strong quality product, strategic marketing, location, collaboration and receiving start-up support are the most common reasons for success. The broad array of skills required to undertake such a venture, attracting and retaining staff, access to finance, red tape, and lack of infrastructure were all cited as common challenges to overcome.

Access to the right kind of support is identified as being critical. Support encompasses the notion of being a part of an agritourism community, peak bodies for marketing, coordination, collaboration and sharing ideas, training programs in agritourism business development and growth and grant opportunities. Grants and awards were regarded as a success in their own right. However, multiple participants, given their taxable status, questioned the usefulness of grants. The importance and usefulness of collaboration between agritourism businesses was highlighted throughout the interview responses.



Learnings from agritourism in other regions

Kiribati

Kiribati had its first meeting on agritourism in February 2019, led by the Kiribati National Tourism Office, part of the Ministry of Information, Communications, Transport and Tourism Development.

The plan is to establish an agritourism secretariat/committee that will oversee and plan future development projects that promote agritourism in Kiribati. The committee members will be active farmers, farmers' association, tourism operators, Kiribati National Tourism Office, Kiribati Chamber of Commerce, the Ministry of Fisheries, Marine and Resource Development, the Ministry of Commerce, Industry and Cooperatives and the Ministry of Environment, Lands and Agriculture Development.

The broad aim is that agritourism development can fill the gap between local agricultural products and hotels. It can provide a solution to unemployment, where youths are trained and engaged in small-scale farms and businesses that can generate income and a better lifestyle. If agritourism is promoted successfully, locals will be inspired to generate revenue from their small farm and be encouraged to eat a balanced diet.

South Africa

While there is government support for tourism in South Africa there is no direct mention of agritourism in government reports. This suggests a certain lack of commitment to agritourism from government departments. Alternatively, there are non-government programs and initiatives in place that aim to support the development of agritourism in South Africa. For example, Agritourism Africa is a non-government organisation that supports agritourism businesses with development and promotion. The organisation acts as an information hub for visitors and provides advice and guidance to its members. This support includes assistance with a broad range of marketing and promotional initiatives, an online training program, representing agritourism in government, tourism and organised agricultural institutions and continuous consultation with members to ensure potential of these initiatives are being realised. Similar to agritourism business in Tasmania, farmers in South Africa are turning to agritourism as a means to diversify. However, they are facing challenges in developing the business competencies required for success. This highlights the need to build training programs addressing skill deficiencies in areas such as product development and business management.

United Kingdom

The European Union Common Agriculture Policy (CAP) suggests a change from a protectionist to entrepreneurial focus, using the term 'alternative farm enterprises'. In the UK there is often a lack of business skills in farming, and failure to conceptualise farming as a business. The 2002 Future of Farming and Food report suggests farmers are slow to change or innovate, and need to rediscover a business mindset and use marketing skills to take advantage of new opportunities. Skills and competencies needed to support agritourism success:

- Fundamental business skills – management skills, innovation, risk management, discovery, evaluation, exploitation of opportunities and environmental scanning
- Entrepreneurial skill set particularly as subsidies decline – co-entrepreneurship and entrepreneurial teams.

Studies suggest that UK growth in agritourism to date has been less than expected for a range of reasons including; reduced research and development funding; shift in funding from productivity to social issues; loss of advisory services; subsidy impacts; and increasing constraints on resources.

California, United States

The University of California (UC) Sustainable Agriculture Research and Education Program, working with rural based UC Cooperative Extension farm advisors, provides resources for agritourism operators and hosts a statewide directory of agritourism enterprises and a calendar of agritourism events.

Resources include information on business planning and management (including developing relevant business plans), marketing agritourism operations, and permits and regulations (step by step, peer reviewed introduction to dealing with regulations). Fact sheets and worksheets for those starting out include assessing assets, assessing options and goals, adding value and personalising services, creating a business plan, conducting farm tours, marketing strategies, safety and risk management as well as an extensive list of potential enterprises for agriculture and nature tourism.

An online statewide directory helps visitors to find a farm or farm trail or agritourism event in a particular area. Regional agritourism summits are held for anyone involved in Californian agritourism to share ideas and encourage collaboration. Examples of farm trail map development and resources for collaborative agritourism marketing have been developed and shared. Practical webinars and online forums on relevant topics are held regularly.

Colorado, United States

The objective of agritourism in Colorado is seen to assist farms in staying economically viable and, more broadly, to revitalise rural economies, better educate the public about agriculture, and/or preserve agricultural heritage. Agritourism is seen to be an attractive option to community-focused farms because it provides more labor opportunities for members of the family or community, better networks the farm into the local service economy, and educates the public about agriculture.

Colorado is the first US State to introduce a Graduate Certificate in Agritourism Management at Colorado State University and has been undertaking research specific to understanding and promoting agritourism over the past fourteen years.

It is broadly recognised by associated organisations that there are links between agritourism and broader public issues, such as food systems, conservation and natural resource management and economic and community development.

Colorado is similar to Tasmania in many aspects. Visitors primarily visit on holidays and both destinations have strong natural attractions as the key demand driver, attracting those seeking lifestyle changes and wellness.

Oregon, United States

Oregon established the Oregon Agritourism Network in 2015 and has developed an extensive pool of resources available for potential and current agritourism operators. The network was set up by the tourism body and brought together relevant industry participants to develop a vision for the agritourism industry. Farmers, ranchers, chefs, food processors, guides, planners, regulators and community leaders were all encouraged to join the network in its aspiration to realise the potential for agritourism in Oregon. It does this by advancing six priority areas:

- Policy advancement
- Statewide industry driven network development
- Targeted marketing and promotion
- Quality of product and meaningful standards
- Stewardship education
- Economic impact.

The body meets regularly and provides updates on the strategy and progress towards their stated goals. The resources include a marketing toolkit and a detailed handbook for agritourism business which provides frameworks to help develop detailed business plans, assess risk and navigate through land usage requirements.

Key areas of opportunity

Using the informal research findings and their own experience, the participants identified the following six areas of opportunity for improvement of the Tasmanian agritourism sector:

- 1 Improving industry collaboration/ community
- 2 Marketing – customer experience and awareness
- 3 Upskilling/training – owners and staff (trying to reduce the impact of seasonality)
- 4 Understanding the market, your needs/capabilities, location and how they might limit options selecting the right business for the market, location and business owner
- 5 Changing economic drivers – building resilience and future proofing
- 6 Regulatory constraints and enablers (good planning support)

From these six topics, participants identified one that they would like to work on and subsequently formed three groups that worked together to brainstorm and explore the following topics:

- 1 Building resilience
- 2 Improving industry collaboration
- 3 Understanding the market

Building resilience

What is agritourism?

Agritourism combines the complementary activities of tourism and agriculture and has become a deliberate strategy used around the world to achieve a range of objectives, such as economic growth, regional economic diversification and resilience. Agritourism activities generally fall within the categories of direct sales, education, hospitality, outdoor recreation and entertainment, but there are a number of ways in which agribusinesses may engage in the visitor economy, both directly and indirectly.

The objective of agritourism is to enhance and revitalise rural economies, better educate the public about agriculture, and/or preserve agricultural heritage. It is often used as a strategy for encouraging farmers to stay on the land by diversifying operations to remain economically viable and providing opportunities for local employment which is important for regions with dispersed populations.

Although people have engaged in agritourism activities for a very long time, when considered as an 'emerging sector' and 'strategic approach', the definitions tend to differ across jurisdictions, depending on the context of the location, the issue it is trying to address and the objective it is trying to achieve.

Why agritourism?

Agritourism purports to generate a number of benefits, such as, but not limited to; generating new or secondary income for farm operators; diversifying product lines and markets; allowing direct feedback from consumers about preferences for products and services; providing urban people and visitors with an experience of rural living, thereby creating a 'culture of understanding' about the importance of agriculture in rural communities thus, reducing

conflicts over farm practices and strengthening public support for the existence of farms; preserving the visual and cultural rural landscape; and creating new markets and contacts¹.

Agritourism includes themes and values such as connectedness, authenticity, distinctiveness, rawness, outdoors (fresh air), earth and human ingenuity, which align with those that underpin Tasmania's brand. There are also linkages between agritourism and broader public issues, such as food systems, conservation and natural resource management, economic and community development².

Agritourism appears to be a logical fit for Tasmania as it complements the State's competitive strength in agribusiness, the Tasmanian Government's ambitious target of the value of agriculture reaching \$10B by 2020 and the T21 Visitor Economy Strategy's yield and dispersal activities to drive visitation to the regions. Already a burgeoning sector, there are numerous examples of businesses, festivals and trails showcasing the State's established agritourism sector, yet there may still be great unrealised potential.

Defining agritourism

Definitions of agritourism differ across jurisdictions depending on the context of the location and the objective. Definitions are incredibly important as they provide a clear starting point should agritourism be pursued as a sector of strategic importance before building awareness, policies and initiatives for growth. Agritourism: Toward a conceptual framework for industry analysis (2018) argues that using a precise definition will not only improve the ability to assess agritourism's impact, but also enable clear communication, reliable and consistent measurement, informed policies, and programs that support farms and their communities³.



Agritourism in Italy for example, was developed to halt rural out-migration by keeping farmers on the land. It has been defined under national law as “the activities of hospitality performed by agricultural entrepreneurs and their family members that must remain connected and complementary to farming activities”⁴ as a means to ensure that the provision of support and funding is funnelled accordingly.

The focus in Oregon, however, is on economic growth with an aim of growing the number of high-quality agritourism products to attract those who will travel >50km and perhaps stay overnight in the region, spending their dollars. Another key focus in Oregon is ensuring that agriculture remains the primary revenue for producers emphasising the importance of the sector to the economy and the collaboration between sectors⁵.

The Tasmanian Government in its position paper in 2016 uses a definition of agritourism that is all “on farm experiences” and associated community/industry activities⁶, ignoring the importance of the visitor economy and potentially encompassing a variety of activities that fall outside of the general agritourism scope. It currently provides little clarity about the strategic direction of Government, nor its objectives and potentially hinders attempts to fully understand or assess the sector’s economic importance.

Case studies – enablers

Tasmania has had some incredible stories of success. Two case studies are provided below that present activities in the north of the state that were established to provide opportunities for agribusinesses to engage in the visitor economy. The Harvest Market and Farmgate Festival both help to support and enable some of those critical stages of business development, and start to test their product before deciding whether to engage in a full-scale tourism operation.

FARMGATE FESTIVAL

OVERVIEW	A premiere food and farming event in the Tamar Valley of northern Tasmania. A selection of farmers and producers open their gates for a weekend each year giving the public the chance to go behind the scenes on the farm, meet the people who grow and make the food, and hear their stories.
PROBLEM FACED	Starting a tourism-facing component for an agricultural business can be a daunting and expensive task for agricultural operations; especially in the start-up period. There is the added uncertainty of whether there will be enough customers to warrant opening regularly or putting on staff. These unknowns and costs can stop agricultural business from pursuing a move into agritourism.
PROBLEM SOLVED	Farmgate Festival is a way for small farms to open to the public for a weekend each year to tap into the benefits of agritourism without the annoyances of opening all the time and not having suitable facilities for opening all the time. It gives farms an idea of the risk (traffic, dams, safety, tidiness) and regulations (food safety, insurance) that is involved in opening to the public. Farms have the chance to perfect a tourism pitch or story about their farms by providing tours to groups of 5-30 visitors at least every hour over the weekend.
FUNDING	Funding was received from Events Tasmania to support the collaboration.
COMMENT	Farmgate Festival removed the barriers faced by many small operators and has allowed them to consider what scale they may like to operate their tourism business at without the costs and risks of launching a full scale tourism business.
OPPORTUNITY	Farmgate Festival expanded to other regions over different weekends

¹ Extract from Draft Assessing the Agritourism and Farm-based Education Potential of your Region and your Farm Property, West Virginia Agritourism initiative, West Virginia University Extension Service

² NIFA Agritourism Project Colorado – <https://agritourism.localfoodoeconomics.com/about-the-project>

³ 2018, Chase, L.C. Et al, Agritourism: Toward a conceptual framework for industry analysis, Journal of Agriculture

⁴ 2009, Porcaro, P., Agritourism in Italy, International Specialised Skills Institute Inc.

⁵ 2017, Agritourism Handbook, Oregon Agritourism Network

⁶ 2016, Draft agritourism position paper, Department of State Growth, Tasmanian Government



HARVEST LAUNCESTON – COMMUNITY FARMER’S MARKET

OVERVIEW	Weekly farmers’ market in the Launceston CBD.
GOAL	Introduce the Launceston community to local food growers and makers and showcase the breadth and quality of Tasmania’s produce.
BENEFIT	Harvest Market is a tourist venture in its own right and provides an opportunity for local agricultural businesses to access the benefits of the tourist market without the requirement for direct farmgate operations.
FUNDING	The establishment was self-funded.
OPPORTUNITY	Farmers’ markets provide an easy avenue for agricultural operators to access the agritourism market without the requirement for a full-scale tourism operation.

Building a resilient sector

The challenge Tasmania now faces is how to build on and support its existing agritourism sector and maximise the potential benefits of an emerging and latent agritourism sector.

A TOWS analysis (fig.1) considers some of the threats, opportunities, strengths and weaknesses in the existing and potential agritourism sector based on feedback from operators and barriers identified by the Thinkbank group. Presented only as an example as it provides a few suggestions of potential strategies that may support both an existing, emerging and latent agritourism sector.

Recommendations and conclusions

Agritourism presents an enormous opportunity to add value to the Tasmanian brand and socio-economic vibrancy of the State. To harness the opportunity:

- Successful examples of agritourism should be showcased and supported to inspire others to consider how they could step into this emerging field or connect with those who are doing it.
- Strategies such as recognising and rewarding champions, supporting existing agritourism businesses through marketing, identifying agribusinesses with agritourism potential who are visitor ready as well as peer learning would be useful actions to strengthen the opportunity.
- At a State level, clear goals and targets to promote sustainable practices such as waste and emissions reductions, improving water quality, regenerative agriculture and building resilience to natural disasters, climate change and other shocks.

TASMANIAN AGRITOURISM TOWS ANALYSIS		INTERNAL	
		Strengths Brand awareness Business and income diversification Lifestyle choice Supply chain management Resource management Sustainability Skills development Brand	Weaknesses Marketing costs Red Tape Contractual barriers Skilled staff Apprehension or disinterest from agribusinesses Lack of knowledge in tourism and business models Unknown returns Access to finance Perception Planning restrictions
EXTERNAL	Opportunities Job creation New regional tourism product and visitor dispersal Sector resilience and expansion Cross-sectoral linkages Destination clusters Brand enhancement Community resilience Education Linkages to market Transition to sophisticated sector	SO Strategies Recognise and reward champions Support existing agritourism business through marketing Identify agribusinesses with agritourism potential who are visitor ready Peer learning	WO Strategies Support enabling activities such as events and markets Ascertain and promote who is the customer? Partnership facilitation opportunities – tourism and agriculture Workshops and other activities to educate agribusinesses on business opportunity and ways to engage with visitors Collaborative marketing opportunities Peer learning
	Threats Competitor destinations Lack of industry cohesion and support Lack of definition and strategic clarity Biosecurity Climate change Degraded ecosystem function (water, soil etc.) Capacity constraints Regulation Economic growth prioritised over environmental and social impacts	ST Strategies Commitment to action at all levels of Government to promote sustainable practices Develop a definition and strategy Integrate promotion within state marketing activities Develop an industry coordination body with members from agriculture and tourism Develop guidelines around best practice resource management and biosecurity	WT Strategies Research value of existing agritourism sector and value of potential sector Identify and implement red tape reduction Knowledge sharing around sustainability solutions/ innovations Set clear state level sustainability goals and targets to protect brand, product and environment

Figure 1; TOWS analysis for Tasmanian agritourism

Improving industry collaboration

Beginning with the summary of interview findings and building on group conversations in the morning session of Thinkbank, the members of this group believed that collaboration has the potential to address many of the issues that limit the success of the agritourism sector. This applies to existing agritourism operations, potential agritourism operations, and the sector as a whole.

Collaborative structures can reduce barriers to entry, help solve specific operational problems, create critical mass, and help define the strengths or character of a locality.

Importantly, a successful agritourism sector has the potential to meet the State Government's goal of increased dispersal of visitors to regional areas of Tasmania, thereby helping to ensure the sustainability of regional communities.

Collaborative structures can be:

- 1 Informal
 - ▶ Ad hoc knowledge sharing between businesses
 - ▶ Groups of local businesses with shared goals interacting voluntarily on a regular or ad hoc basis.
- 2 Formal
 - ▶ Collaborations defined through incorporation and constitution.
 - ▶ Collaborations that are facilitated by agencies or government with defined goals, key performance indicators, budgets etc.

The group established a model that would lead to a vibrant agritourism ecosystem in Tasmania. Our model has three levels:

- The **sub-regional or local level** where businesses collaborate, mostly informally, to provide **drive** through building local strengths and distinctiveness
- The **regional level** is the pivotal level, where tourism agencies have a **facilitative** role for agritourism within the region
- The **state level**, which provides a **supportive and enabling environment** for the agritourism sector in Tasmania.

The group's recommendations are detailed below.

The state level

Overall goal – to provide a supportive and enabling environment for the agritourism sector in Tasmania.

Recommendations:

- Premier in Conversation – overall goal is for the Premier to be convinced of the importance of agritourism and acknowledge the need for a supportive agritourism strategy for the future of Tasmania's regions
- The Minister for Agriculture to be added to the Premier's Visitor Economy Advisory Council
- State Government to finalise its agritourism strategy (noting 2016 white paper)
- A state agritourism coordinator to be appointed within the Agriculture Policy Unit in the Department of State Growth
- Brand Tasmania to ensure agritourism is a prominent theme in how it tells the Tasmanian story
- Skills Tasmania, Department of Education, Institute of Technical and Further Education (TasTAFE), University of Tasmania to consider how to meet the skills needs of the sector, which crosses boundaries between traditional course silos
- Tourism Tasmania to publish a 'Tasmanian Agritourism Handbook' which pulls insights from Oregon's (<https://industry.traveloregon.com/opportunities/marketing-co-ops-toolkits/toolkits/welcome-oregon-agritourism-handbook>) and would include case studies of agritourism operations across food and beverage, accommodation, events and experiences
- Introduction of an agritourism-specific grant scheme which can be tied to regional and local priorities, environmental and social improvements
- An annual agritourism-specific industry conference with invited interstate and international speakers
- An agritourism component to be added to State international trade and tourism delegations
- Investigate provision of umbrella insurance to support and enable agritourism-centric events organised by informal collaborative groups at a local level.

The regional level

Overall goal – Regional Tourism Organisations (RTOs) to lead and facilitate development of the agritourism sector within their region.

Recommendations:

- RTOs to ensure there is representation from the agritourism or agriculture sector on their boards
- Destination Action Plans (DAPs) to ensure agritourism is considered as an important component of the overall tourism offering in regional Tasmania and that the specific needs of the sector are adequately addressed
- Support sub-regional and local groups through:
 - ▶ Mapping of agritourism operations to:
 - help identify the strengths and character of a given area
 - identify gaps and weaknesses in the offering (e.g. mismatch between experience-based offerings and accommodation)
 - include a time element for seasonal offerings and better scheduling of events.
 - ▶ Planning to:
 - Facilitate collaborations that fill-in identified gaps and weaknesses.



- Provision of help, advice and funding for collaborative marketing with:
 - ▶ Driving routes
 - ▶ Theme maps – avoiding being too product specific
 - ▶ Itineraries
 - ▶ Websites.
- Provide quality control through targeted intervention in specific businesses, such as:
 - ▶ Enforcer-type role (we don't take kindly to shit coffee round these parts)
 - ▶ Brand protection.
- Organise regional industry events for the benefit of sector participants and entrants.

The sub-regional or local level

Overall goal – agribusiness drives the development of the sector through collaborations that build local strengths and distinctiveness.

Ultimately, the success of the agritourism sector in any given area will depend more on the motivation of individuals, and the quality of collaboration between those individuals, than any other factor.

Individual operators should look for opportunities to exchange knowledge and goodwill with other operators, building informal local networks.

Organisers and champions will emerge from these informal networks to lead the liaison with the RTOs and advocacy/lobbying of the State.

Ideas for events will be conceptualised that may be led by a small number of agritourism operators in a local area but involve many. These are important as they build community and identity, provide prototyping opportunities for new or potential operators, require a diversity of skills, and the combined effort extends the marketing reach and pulling power of individual businesses. Good examples include The Tamar Valley Farmgate Festival (www.farmgatefestival.net.au) and Tasmanian Garlic and Tomato Festival (www.tgtf.org.au).

As the movement grows, informal collaborative groups may benefit from formalisation, through incorporation, around shared goals to develop a stronger identity and brand for a given area of a given theme within a locality. Formal organisations hold greater sway with government and government agencies. Good examples include Tamar Valley Wine Route (www.tamarvalleywineroute.com.au).

Understanding the market

The issue

The group identified that it is difficult for an interested person or authority to understand the agritourism market in Tasmania.

Background

It is important that current industry participants, potential industry participants, government and not-for-profit groups providing support all understand the agritourism market in Tasmania.

Understanding the market enables industry participants to identify the right business to pursue and what its potential for success is, and for industry development funding to be directed appropriately.

Shared, accurate understanding of the agritourism market in Tasmania will also drive and connect the market, enabling the most suitable businesses to build a thriving, resilient industry.

Like any other industry, the agritourism industry needs political recognition and support for generalised business development and a personal fit model for assessment of individual business reflection and strategy. Understanding the agritourism market is the key to this.

Research

The group discussed and scanned the internet for sources of information about the Tasmanian agritourism market. This identified data collection that is currently or has previously been collected and information sources that have not yet been utilised, such as:

- Tasmanian Visitor Survey (Tourism Tasmania)
- Tourism Tracer (University of Tasmania) study ([see https://tourismtracer.com/about](https://tourismtracer.com/about)).

Note that this data is limited to interstate and international visitation and does not collect local, intrastate visitation trends, and not specifically agritourism.

Information sources that do not appear to have been utilised are:

- existing agritourism businesses (could capture through collaboration and survey)
- local Tasmanians.

Detail required

The group considered exactly what information will enable analysis of the agritourism market in Tasmania and listed (See Table 1). Throughout discussions there was also an identified need to outline what business constituted 'Agritourism in Tasmania; (See Table 2).

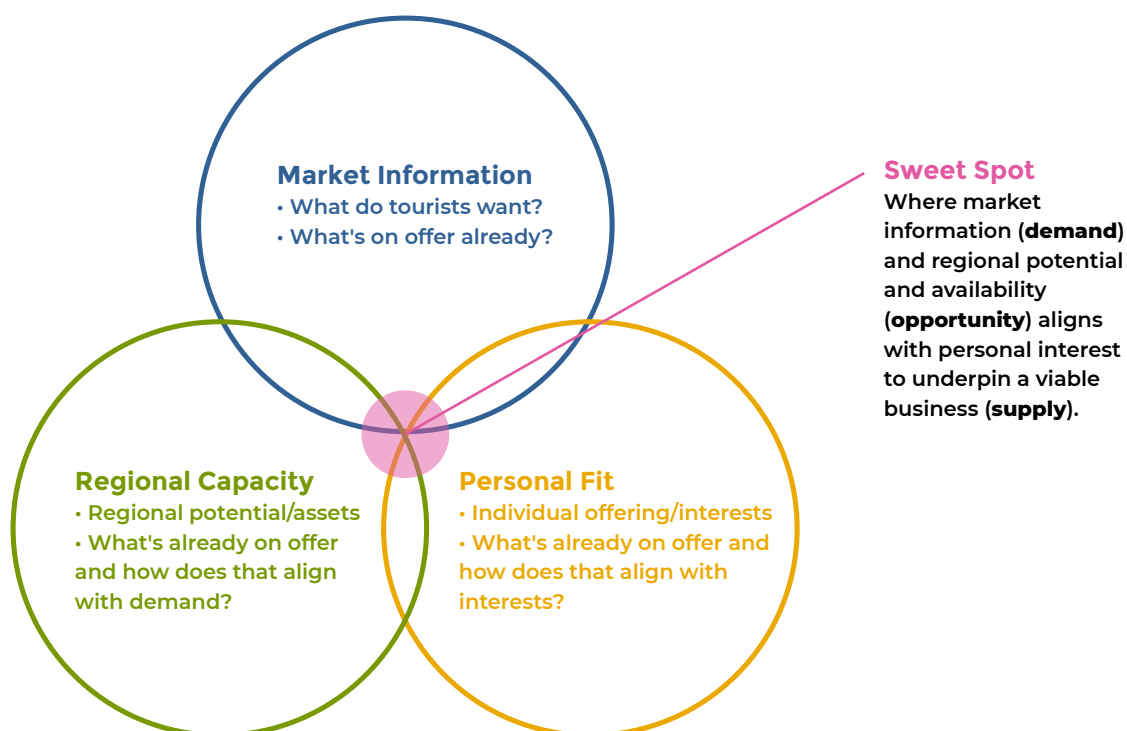


Figure 2; Understanding the agritourism market in Tasmania

Table 1; Information required to enable analysis of the agritourism market in Tasmania

Time and duration of visit
Places visited
Experiences undertaken
Expectations upon arrival
Budget/spend capacity for accommodation, transport, activities, food
Origin of visitors
How do visitors find providers?
What is the size of the businesses that are currently operating in the sector?

Table 2; Businesses that constitute Agritourism in Tasmania

Cellar door
Farm Stay
Education
Food
Industry tours
Farm or animal experiences
Sport or recreation on a farming property
"U" pick
Events (e.g. AGFEST)

Solutions – action points

The following actions have been proposed to promote an interested person or authority to collect and collate data about the Tasmanian agritourism market:

- Engage Tourism Tasmania regarding addition to current data collection, analytical support, insights, advocacy for agritourism as a principle;
- In consultation with experts such as Tourism Tasmania and UTAS, promote a new collection of data that will identify the agritourism market in Tasmania.

This will be something like, but not limited to the data sets identified in table 1, specific to each of the types of business in Table 2;

- Establish an agritourism advocacy committee and/or role to be created within an existing organisation to make contacts, identify and summarise existing data, do preliminary analysis, compile, interpret and distribute summary information, generate templates (e.g. for funding applicants);
- Encourage potential users to request data (explain value proposition); and
- Create a focus/advocacy group by identifying interested businesses, potential collaboration and mentor groups (start with Tasmanian Leaders Thinkbank group, interviewees, researchers and then expand out regionally/statewide).

The following actions have been proposed to promote the use of data:

- Engage government in agritourism as a principal (independent) business opportunity – Tourism, State Growth, Primary Industries, Environment and Water;
- Raise awareness by sharing data to existing organisations, such as Tourism Tasmania, Tasmanian Farmers and Graziers Association, Tasmanian Seafood Industry Council, suggesting that they circulate to members;
- Make the information accessible by ensuring that it is published in a variety of easy to use formats, easy to find and linked to places where it is already required, such as for grant applications, investment opportunities or awards etc.;

- Share information with intermediaries/interpreters such as data analysts, specialists, business start-up supporters;
- Create or identify a model to enable potential industry participants to assess their 'personal fit' with the industry based on the market information (e.g. the Oregon Agritourism Network's Agritourism Handbook, which is available online);
- Propose an agritourism award to Tourism Tasmania; and
- Use locals to spread the word about the data and agritourism generally, discuss with media, and use networks to get locals invested and to promote businesses in their region.

Potential issues

We identified the following potential problems and strategies to avoid them:

- If data collectors and collators don't share the same definition of agritourism, there may be gaps in information or inaccurate figures. Good communication and consultation should avoid this problem;
- In order to keep the information relevant, there must be regular updates;
- There is a risk of duplicating effort or wasting time and money. Good research, communication and consultation should avoid this problem; and
- The level at which data is collected needs to be 'fit for purpose'.

Final thoughts – Thinkbank 2019

Thinkbank 2019 identified the issues and challenges of agritourism in Tasmania and highlighted some key areas of opportunity to enhance the sector's vibrancy.

The key challenges

Business development skills	Both the staff and business owners need to have a broad range of skill sets across the agriculture and tourism components of the business. When business operators are farmers wishing to diversify using tourism, there is an identified need for greater support in developing the tourism section of the businesses.
Staffing	Recruiting and retaining qualified and skilled staff, particularly in rural areas.
Finance	Ensuring cash flow through seasons and obtaining finance to grow the business. While grants are welcomed and considered an achievement to business owners, it has been suggested that they not be considered taxable income.
Red tape	Process to obtain council planning approval (i.e. signage) and the perception that there are potentially duplicate fees for the similar things across multiple government departments.

Opportunities for enhancing agritourism in Tasmania

Support and collaboration	Provide support and training in business development, particularly marketing
	Provide better support in the planning and approvals processes
	Develop mechanisms for inter-industry collaboration to share learnings and promote businesses of the same type or in the same regions i.e. agritourism trail
Grants and awards	Make grants not taxable income
	Develop an agritourism award section in the Tasmanian Tourism Awards
Market research	Identify information gaps and market demands to inform product development and strategic marketing
High class products	Produce and market high quality products rather than attract mass cheap tourism

Advice for aspiring agritourism businesses

Product	Provide products with integrity, authenticity and a point of difference
	Value-add to your products where you can
	Ensure your location is good for both agriculture and tourism
	Have long shelf life products that customers can easily take with them when travelling
Relationships	Build relationships with government planning and approvals departments
	Share learnings and build collaborative opportunities with other businesses
	Talk to lots of people and find mentors
	Facilitate relationships with markets (i.e. overseas travel agents)
Market research and strategic marketing	Undertake your own market research and draw on other sources of information such as research conducted by government departments or science institutions to understand how to develop and market the product
	Marketing via word of mouth is important
Enjoy what you do and work hard	Long hours and strong drive is required to run both agriculture and tourism sections of the business. Therefore, you must enjoy what you do
	Make sure you are the right person to work in tourism
Operate with integrity	Contribute to the local community
	Operate fairly within the business community
Plan	Be flexible, but also develop and stick to a business development plan
	Ensure tourism and farm operations are compatible
Finance	Have a second income in start-up years
	Minimise overheads
	Develop a contingency plan and undertake risk management
	Record business trends
	Manage cash flow to reduce the impact of seasonality of the sector
Learn	Develop business management skills
	Outsource for things you need help with
	Understand all regulations before you start

Thinkbank 2019 'Our Place in the Sun – Harvesting Tasmania's Agritourism' does not end with this document.

In the upcoming conversations with various interested parties there will be discussions about the ideas raised and possible actions to be taken. As part of this process more specific action plans will be developed to identify what will be done and who will be responsible for doing it. We look forward to this next stage in the Thinkbank 2019 process.

If you or your organisation would like to contribute, please contact Angela Driver, General Manager, Tasmanian Leaders Angela.Driver@tasmanianleaders.org.au phone: 0417 379 703

Coco Cullen-Knox has been responsible for producing this document based on the contributions of Thinkbank participants and interviewees.

Brian Lewis owns the intellectual property for the design and delivery of the Thinkbank process and event.

Tasmanian Leaders receive foundation support from the Tasmanian Government to support the delivery of our major leadership programs.

Photos: Puddlehub, Chris Crerar and Tasmanian Leaders

Snapshot of participating agritourism businesses

Tasmanian Leaders sincerely thanks the 41 businesses, including the fifteen below, who were interviewed by the nineteen participants prior to the event.

Blue Hills Honey Experience, Mawbanna

For three generations Blue Hills have harvested honey from one of the most untouched regions of the world, the Tarkine forest. At the heart of Blue Hills Honey and its rare products, is its relationship with this unique Tasmanian environment. Visit the farm shop and experience the varieties of honey available, including the famed unique leatherwood honey. Sample one of the world's most ancient drinks- honey mead. Browse the gift shop and view the packing process room. Sample local produce, house baked goods and tapas style food from the Leather & Wood Cafe. Open seven days a week excluding some public holidays. Travel a further 8 km to the beautiful Dip Falls and the Big Tree.

www.bluehillshoney.com

Diemen Pepper, Birchs Bay

Diemen Pepper is the 'engine room' at the mixed farm, Five Bob, at Birchs Bay. Five Bob is a mixed horticultural enterprise with an interest in tourism and public amenity. It includes a café and community garden, and supports art based not-for-profit projects (sculpture trail, community events etc.). Diemen Pepper has taken Tasmanian Native Pepper from 'curiosity' status in the early 1990's to a significant export focussed enterprise today – guided tours can be arranged.

www.diemenpepper.com

Bruny Island Cheese Co., Bruny Island

Bruny Island Cheese Co. was started by Nick Haddow in 2003 on Bruny Island. The cheeses were inspired by Nick's travels and training throughout the great cheese producing regions of the world. Since then Nick has added a craft brewery, an organic dairy farm and a wood-fired bakery to his stable, at its unique 'island off an island', about 30 minutes from Hobart.

Bruny Island Cheese Co. cheeses are all made and matured using traditional techniques and are highly regarded as being some of the finest artisan cheeses made in Australia. Nick's cheeses reflect the seasonal nature of their Huon Valley farm and their herd of rare breed cows, giving a distinctly Tasmanian character. The cheese tasting rooms are on Bruny Island, fourteen minutes from the ferry terminal. Nick is an innovative leader in the agrifood sector in Tasmania. His cheeses and beers are regarded as some of the best in the country and are predominately sold around Australia through the on-line Bruny Island Cheese Co. community. Nick is a passionate Tasmanian who also serves as Chair of Brand Tasmania.

www.brunyislandcheese.com.au

Get Shucked, Bruny Island

Get Shucked produces oysters of outstanding quality, sustainably cultivated in the pristine waters of Great Bay, Bruny Island, Tasmania. They are a locally owned and operated oyster farm and bar, with oysters harvested, shucked and served fresh daily.

www.getshucked.com.au

Hartshorn Distillery & Grandveve Cheeses, Birchs Bay

Grandveve Cheeses is situated on 80 acres of pristine farm land overlooking the D'Entrecasteaux Channel and Bruny Island, forty minutes south of Hobart. Grandveve Cheese produce a wide range of products with a focus on high quality sheep cheese, and other dairy products made from their own flock of sheep. Hartshorn Distillery is a new Tasmanian micro distillery making boutique batches of vodka and gin from their own sheep's whey.

grandveve.com.au

Harvest Launceston (Farmers Market), Launceston

Every Saturday morning in the heart of the Tamar Valley, Harvest Launceston Community Farmers' Market brightens a quiet inner-city car park and brings the farm gate to the city. There are farmers, locals and baskets brimming with Tasmania's freshest seasonal produce, ethically raised meat, free from artificial hormones, organic dairy, artisan bread and pastries, bright summer berries or autumn apples. There is locally roasted coffee and wonderful tastes and a myriad of premium produce, cool-climate wines, artisan ciders and homemade preserves.

info@harvestmarket.org.au

Mount Gnomon Farm, Penguin

Mount Gnomon Farm rests against the Dial Range – a tract of wilderness that stretches from Penguin to Cradle Mountain in Tasmania's North West. Free range heritage produce, cider and functions – a genuine paddock to plate experience. They farm rare breed free range pigs, attend farmers markets, festivals and run an on-farm tourism centre.

www.mountgnomonfarm.com.au

Tarkine Fresh Oysters, Smithton

Plucked from the pristine, nutrient rich waters of Tasmania's rugged North West coast, Tarkine Fresh Oysters are delivered straight from the sea. They have a new licensed café and retail store in Smithton where visitors can choose from deliciously cooked or freshly shucked natural oysters from their oysters farm; dine in or takeaway.

www.tarkinefreshoysters.com.au

Tasmanian Natural Garlic & Tomatoes, Selbourne

Tasmanian Natural Garlic & Tomatoes is a small family-owned and operated business, located in Selbourne in the heart of northern Tasmania. They produce high quality heirloom tomatoes and garlic for the fresh market, gradually diversifying into agritourism. Everything from seeds, seedlings and fresh produce to pantry items.

www.tngt.com.au

The Berry Patch, Turners Beach

Just ten minutes from Devonport in Tasmania's North West, you can experience both culinary perfection from their cafe menu, and an authentic farm experience. You can dine at their restaurant and then hand-pick your own sweet and delicious berries in the 'Pick Your Own' fields. They also have a farm shop where you can purchase pre-picked fruit, and other house made and locally sourced goodies.

www.theberrypatch.com.au

The Dunalley Fish Market, Dunalley

Established about twenty years ago by Bruce Chambers – who serves you to this day – in an old fish market building on the historic Dunalley canal. Located on the road to Port Arthur, about 50 minutes from Hobart, Bruce sources his fish direct from local fishers – not usual in Tasmania. He mainly sells fish+octopus+chips that you can eat there or take away. Either way it comes wrapped in newspaper (with white paper inside to meet health regulations) which matches nicely the old and quirky surroundings. The buildings on the canal are funky and the food is inexpensive – it wins 'best fish and chips' awards. BYO wine if that is your pleasure, otherwise soft drinks, and occasionally some local fresh produce such as broad beans or spinach is available, and fresh fish caught that day if there is a surplus.

+61 3 6253 5428

The Farmhouse Kitchen, Wattle Grove

Specialising in the cuisine of the region of Puglia in southern Italy, home of the Mediterranean diet, the Farmhouse Kitchen is a small cooking school, nestled in the beautiful Huon Valley in Tasmania. At the Farmhouse Kitchen people feel part of an Italian family, and have fun both preparing and eating fabulous foods. Giuliana shares authentic dishes handed down from generation to generation and also provides a cultural and historical background of Italian food and tradition.

www.thefarmhousekitchen-tas.com

The House of Anvers, Latrobe

The House of Anvers is an artisan chocolatier and attraction developed with the chocolate skills learned by Belgian chocolatier, Igor Ban Gerwen. Igor and his staff specialise in chocolate made with heirloom cacao and match this with Tasmanian ingredients such as rich cream, local whiskey, walnuts and berries. The House of Anvers is renowned for giving the visitor a total chocolate experience. Visitors can see the qualified chocolatiers temper, mould and enrobe the chocolates. To complete the experience, there is a small chocolate museum, a tasting centre and a very popular café set in a 1920's Californian bungalow.

www.anvers-chocolate.com.au

28 Gates, Gretna

28 gates is a special piece of luxury, one hour's drive west of Hobart on 5,500 acres dating back to 1862. Originally a horse stable and grain lofts built in 1936 and then shearers' quarters, it has been completely refurbished into luxury accommodation over two floors. Experience a working sheep property, meet the owners, feed the pets, go on a native wildlife tour or just sit back and relax. Also a private fishery so no licence is needed and you can fish all year round.

www.28gates.com.au

Willie Smith & Sons Apple Shed & Cider Makers, Grove

William Smith & Sons is Australia's first certified organic cidery. In 1888, Willie Smith planted the first apple tree in an orchard located in the Huon Valley. Four generations later, fruit is still picked from this orchard – with a few more trees added to it. It's all about orchard to bottle. Organically grown apples are juiced, fermented and bottled, all on the farm.

www.williesmiths.com.au

