



AGRITOURISM MARKET SEGMENTATION

KEY FINDINGS

NOVEMBER 2021

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*To be delivered after the workshop





01

INSIGHTS & RECOMMENDATIONS

KEY FINDINGS

Key insights from the segmentation research

#1

The Agritourism segmentation has uncovered five segments, each with distinct needs that can be triggered to drive appeal

- 1- Connected Adventurers- seeking an opportunity to bond with their travel party and try something new
- 2- Conscious Unwinders- seeking a low key, authentic experience
- 3- Indulgents- willing to spend a bit more on a unique holiday
- 4- Grey-ing nomads- spontaneous and open minded, willing to travel the extra mile to collect experiences
- 5- Family explorers- wanting to entertain and educate themselves and their travel party

#2

There is considerable opportunity to embed Agritourism as an appealing holiday in travellers minds

Agritourism as a term is not yet well understood and Australians do not strongly associate agriculture with Western Australia yet.

Tasmania (Agriculture) and South Australia (Food & Wine) are states competing most closely on the offer.

However, Western Australia can take advantage of associations with diverse landscapes, indigenous culture, road trips and stunning coastlines to tap into drivers of visitation, strengthen Agritourism associations and mould traveller sentiment around the concept.

#3

An Agritourism holiday has particularly strong potential as an add-on activity to an existing trip, currently more familiar with travellers.

Coastal destinations and food & wine experiences have broad appeal across segments and can be leveraged as a gateway to an agritourism trip.

Promoting gourmet escapes, food & wine trails and coastal destinations en-route to more distant destinations can be an effective way of embedding ideas in the minds of travellers that are not yet open to venture out.

#4

Drivers of appeal that can be leveraged across all segments is communicating an Agritourism trip as a unique domestic holiday experience in context of current travel restrictions. In the absence of overseas travel, people are seeking new experiences domestically- a key opportunity for industry providers.

Barriers to an Agritourism trip in WA are perceived expense, distance travelled and misconceived perceptions of a less comfortable holiday experience – all of which can be successfully curbed in communications

KEY THOUGHT STARTERS

An authentic experience & connecting with nature

Promoting an Agritourism trip as an authentic experience shows high potential to convince, especially if paired with 'farm to plate' education

Leverage WA strengths when promoting areas & activities to convince interstate travellers to visit

These include stunning sunrises/sunsets, indigenous culture, road trips & WA's landscape diversity

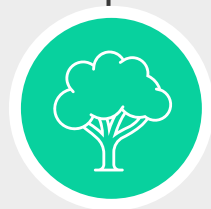
Promote unique experiences

Unique experiences (e.g Dark Sky Tourism) tap into the core need of why people would consider an Agritourism trip – seeking a different type of holiday.



Curb perceptions of 'roughing it'

Agritourism is often associated with Farmstays that involve activities out of the comfort zone. These have potential but require careful targeting



Food & Wine experiences are gateways to other Agritourism activities

Appealing across segments, food & wine experiences can offer a level of entry to consider an Agritourism holiday



Road trip itineraries can mitigate perceived barrier of long travel times

Road trip itineraries with suggestions on things to do along the way can alleviate barrier of wanting to avoid longer drives



Community spirit

Supporting local communities & 'going back to basics' are compelling reasons to take a trip further away from city centers

SEGMENTS: SIZE OF OPPORTUNITY

WHILE CONNECTED ADVENTURERS ARE OUR LARGEST SEGMENT, FAMILY EXPLORERS ARE OUR LOW HANGING FRUIT

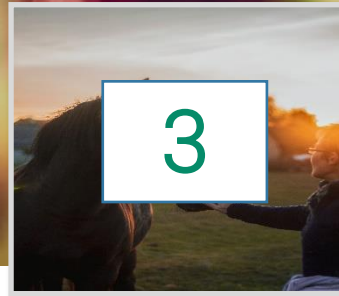
FAMILY EXPLORERS



CONNECTED ADVENTURERS



'GREY'-ING WANDERERS



CONSCIOUS UNWINDERS



INDULGERS



<p>Targeting: Advantages</p>	<ul style="list-style-type: none"> • High knowledge and interest in WA and Agritourism • Interested in a wide range of activities • High willingness to spend 	<ul style="list-style-type: none"> • Large segment size • Limited barriers to travel • Enjoy weekend trips, so may take several trips per year • Don't travel with dependents • Travel needs align closely with Agritourism offer 	<ul style="list-style-type: none"> • Enjoy longer trips & have more time on their hands • Likely to travel further outside of Perth • Likely to advocate and inspire others 	<ul style="list-style-type: none"> • Needs align with agritourism (Nature & sustainability, going back to basics) • Have more time on their hands 	<ul style="list-style-type: none"> • Large segment size • Easily bored, so will likely engage in a range of different activities to stay entertained
<p>Targeting: Disadvantages</p>	<ul style="list-style-type: none"> • Likely unable to travel longer distances and often bound to school holidays • Smaller segment size 	<ul style="list-style-type: none"> • Likely enticed by more romantic/ luxurious offers • Unlikely to take same trip more than once 	<ul style="list-style-type: none"> • Lower disposable income • Smaller segment size • Unlikely to take same trip more than once 	<ul style="list-style-type: none"> • Will likely spend less on activities due to lower disposable income 	<ul style="list-style-type: none"> • Low appeal for agritourism • Prefer more glamorous holidays where budget stretches further

CONSIDERATIONS – ACTIVITIES

BROAD APPEAL

Road trips & activities relating to food and wine appeal across segments and can be used as a trigger for an Agritourism trip

- Food & Wine tours & Trails
- Gourmet escapes
- Tastings at wineries & breweries
- Road trip itinerary

Farmers markets have high appeal, yet are mostly seen as an add-on activity.

TARGETED APPEAL

Certain activities attract high interest among the more adventurous segments 'Grey-ing Wanderers' and 'Connected Adventurers'

- Outback camping
- Historical agricultural exhibits
- Bush tucker experience

Activities relating to fruit picking, educational tours & animal farms appeal most to 'Family Explorers' & 'Grey-ing Wanderers'

- Organic fruit farm stay
- Farm & Agricultural tours
- Horse/ farm ranch stay

LOWER APPEAL

Activities involving farm animals or educational tours have lower appeal overall but still show potential to convince among our open minded family segments:

- Station Stay- Cattle/ Sheep farm
- Garden/ Nursery tours
- Horse Farm/ Ranch stay
- Cycling
- Educational tours on Agriculture
- Farming events

WA RESIDENTS: REGION OPPORTUNITIES

CONNECTED ADVENTURERS

CONSCIOUS UNWINDERS

INDULGERS

'GREY'-ING WANDERERS

FAMILY EXPLORERS

Top Regions of interest

REGIONS OF INTEREST

- + 57% Southwest
- + 52% Great Southern
- + 41% Gascoyne
- + 40% Pilbara
- + 35% Perth
- + 33% Goldfields

REGIONS OF INTEREST

- + 61% Southwest
- + 49% Great Southern
- + 44% Kimberleys
- + 36% Goldfields
- + 32% Gascoyne
- + 28% Perth

REGIONS OF INTEREST

- + 54% Southwest
- + 44% Great Southern
- + 41% Perth
- + 32% Kimberleys
- + 27% Pilbara
- + 22% Gascoyne

REGIONS OF INTEREST

- + 59% Kimberleys
- + 56% Great Southern
- + 55% Southwest
- + 41% Pilbara
- + 39% Gascoyne
- + 38% Perth

REGIONS OF INTEREST

- + 70% Southwest
- + 51% Perth
- + 46% Gascoyne
- + 44% Pilbara
- + 44% Kimberleys
- + 40% Wheatbelt

DISTANCE WILLING TO TRAVEL

7.7hrs

DISTANCE WILLING TO TRAVEL

7.1hrs

DISTANCE WILLING TO TRAVEL

6.7hrs

DISTANCE WILLING TO TRAVEL

10.9hrs

DISTANCE WILLING TO TRAVEL

4.9hrs

Top 3 most appealing trips

1. A wine tasting region surrounded by rolling hills, within a short drive from the city
2. Exploring a coastal wine region, where you can enjoy gourmet farm to plate meals, and taste award winning wine
3. A coastal destination stay, buying freshly picked organic fruit at farm gates and eating fresh fruit ice-cream direct from the farmer

1. A family-owned farm stay with animals, wildflower trails and local farmers markets, where the horizon stretches for miles
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WA NON- RESIDENTS: REGION OPPORTUNITIES

CONNECTED ADVENTURERS

CONSCIOUS UNWINDERS

INDULGERS

'GREY'-ING WANDERERS

FAMILY EXPLORERS

Top Regions of interest

REGIONS OF INTEREST

- + 51% Kimberleys
- + 50% Perth
- + 47% Southwest
- + 41% Goldfields
- + 35% Pilbara
- + 32% Great Southern

REGIONS OF INTEREST

- + 58% Kimberleys
- + 50% Perth
- + 50% Southwest
- + 34% Pilbara
- + 33% Great Southern
- + 29% Goldfields

REGIONS OF INTEREST

- + 49% Perth
- + 39% Southwest
- + 38% Kimberleys
- + 37% Goldfields
- + 26% Great Southern
- + 21% Pilbara

REGIONS OF INTEREST

- + 61% Southwest
- + 59% Kimberleys
- + 55% Perth
- + 37% Pilbara
- + 37% Great Southern
- + 37% Gascoyne

REGIONS OF INTEREST

- + 60% Kimberleys
- + 58% Perth
- + 57% Pilbara
- + 56% Southwest
- + 51% Goldfields
- + 46% Gascoyne

DISTANCE WILLING TO TRAVEL

6.8hrs

DISTANCE WILLING TO TRAVEL

5.4hrs

DISTANCE WILLING TO TRAVEL

7.4hrs

DISTANCE WILLING TO TRAVEL

8.2hrs

DISTANCE WILLING TO TRAVEL

6.7hrs

Top 3 most appealing trips

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02

SEGMENTING THE MARKET

SEGMENTATION SOLUTION

THE AGRITOURISM OPPORTUNITY HAS BEEN SEGMENTED INTO 5 TARGETS

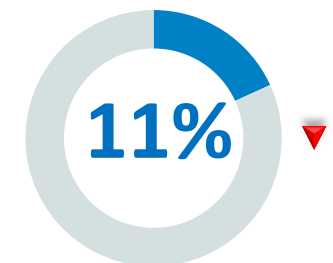
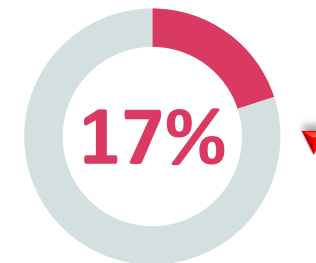
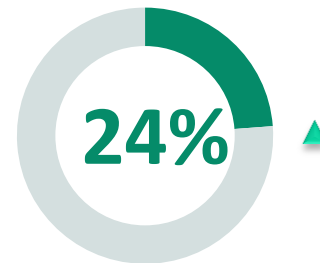
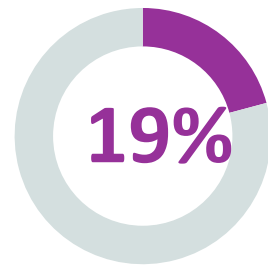
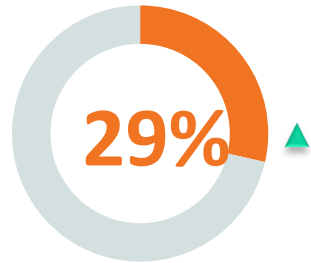
CONNECTED
ADVENTURERS

CONSCIOUS
UNWINDERS

INDULGERS

'GREY'-ING
WANDERERS

FAMILY
EXPLORERS



No significant differences between residents & Non-residents

WA Residents
25%

WA Residents
24%

WA Residents
21%

WA Residents
17%

WA Residents
13%

Non-Residents
30%

Non-Residents
18%

Non-Residents
25%

Non-Residents
17%

Non-Residents
10%

▲ significantly higher/lower than other segments ▼

THE SIZE OF THE OPPORTUNITY

WHILE CONNECTED ADVENTURERS ARE OUR LARGEST SEGMENT, FAMILY EXPLORERS ARE OUR LOW HANGING FRUIT

CONNECTED ADVENTURERS



CONSCIOUS UNWINDERS



INDULGERS



'GREY'-ING WANDERERS



FAMILY EXPLORERS



Very interested in taking a holiday in WA
(Next 2 years)

41%

Interest in Agritourism holiday
(Average out of 10)

7.2 ▲

Know a lot/ Fair amount about Agritourism

17%

Very interested in taking a holiday in WA
(Next 2 years)

43%

Interest in Agritourism holiday
(Average out of 10)

6.0 ▼

Know a lot/ Fair amount about Agritourism

7% ▼

Very interested in taking a holiday in WA
(Next 2 years)

32% ▼

Interest in Agritourism holiday
(Average out of 10)

6.2 ▼

Know a lot/ Fair amount about Agritourism

6% ▼

Very interested in taking a holiday in WA
(Next 2 years)

50%

Interest in Agritourism holiday
(Average out of 10)

7.3 ▲

Know a lot/ Fair amount about Agritourism

9%

Very interested in taking a holiday in WA
(Next 2 years)

66% ▲

Interest in Agritourism holiday
(Average out of 10)

8.4 ▲

Know a lot/ Fair amount about Agritourism

43% ▲



03

SEGMENT PROFILES

CONNECTED ADVENTURERS

WHO THEY ARE

Connected Adventurers often travel as a couple or are a young family around child rearing age (25-34).

They are interested in WA and Agritourism and know a fair bit about it. They are the segment least likely to travel by themselves and enjoy staying in AirBnB's, unique accommodations and experiences, as well as rented houses more so than others

WHY THEY TRAVEL

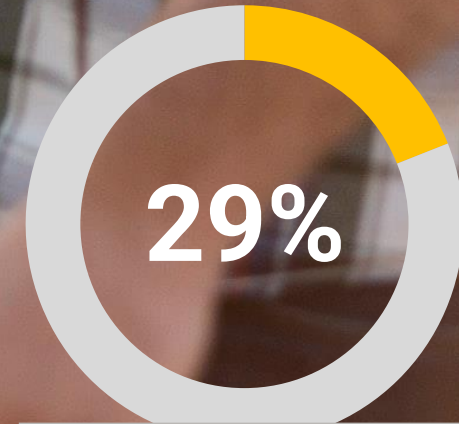
They love to travel to broaden their horizons, more so than other segments and don't mind having a good plan in place to fit in all the activities they would like to do on the trip.

They are more interested in wineries, breweries and wellness than visiting local farmers markets. They don't need one big trip to truly unwind, but enjoy the odd weekend away

Their trips are just as much about me switching off, as it is about keeping my travel party happy- it's a joint experience

HOW TO REACH THEM

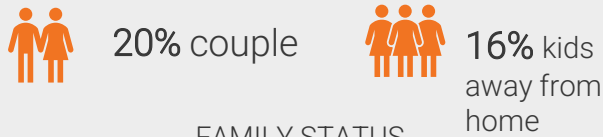
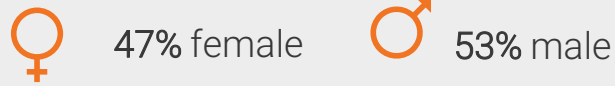
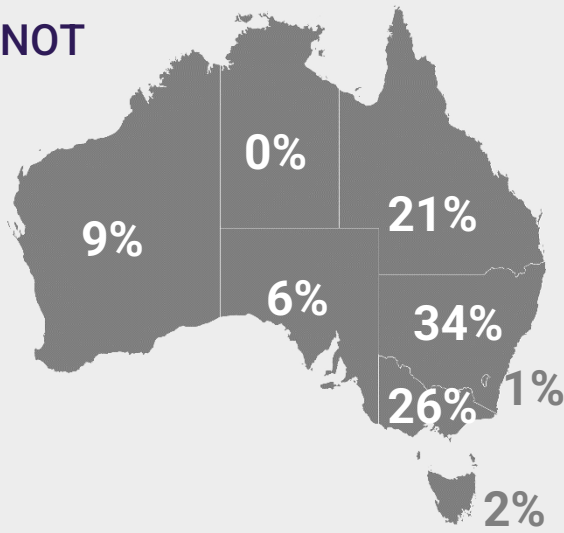
Online travel agent, Travel comparison sites, Facebook, Instagram



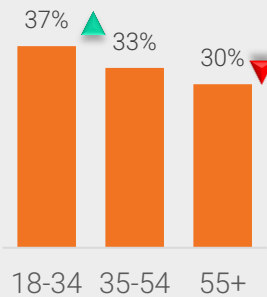
OF OUR TRAVEL MARKET

CONNECTED ADVENTURERS

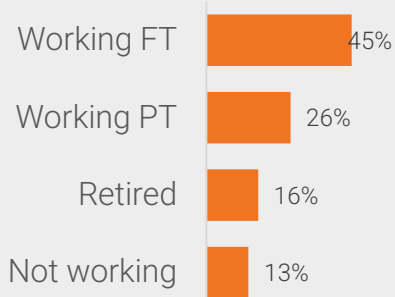
WE ARE YOUNGER AND WORKING. WE ARE NOT ALWAYS A COUPLE, BUT WE TRAVEL WITH PARTNERS



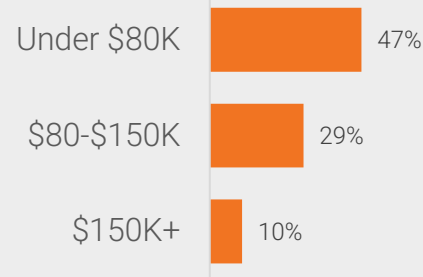
FAMILY STATUS



AGE



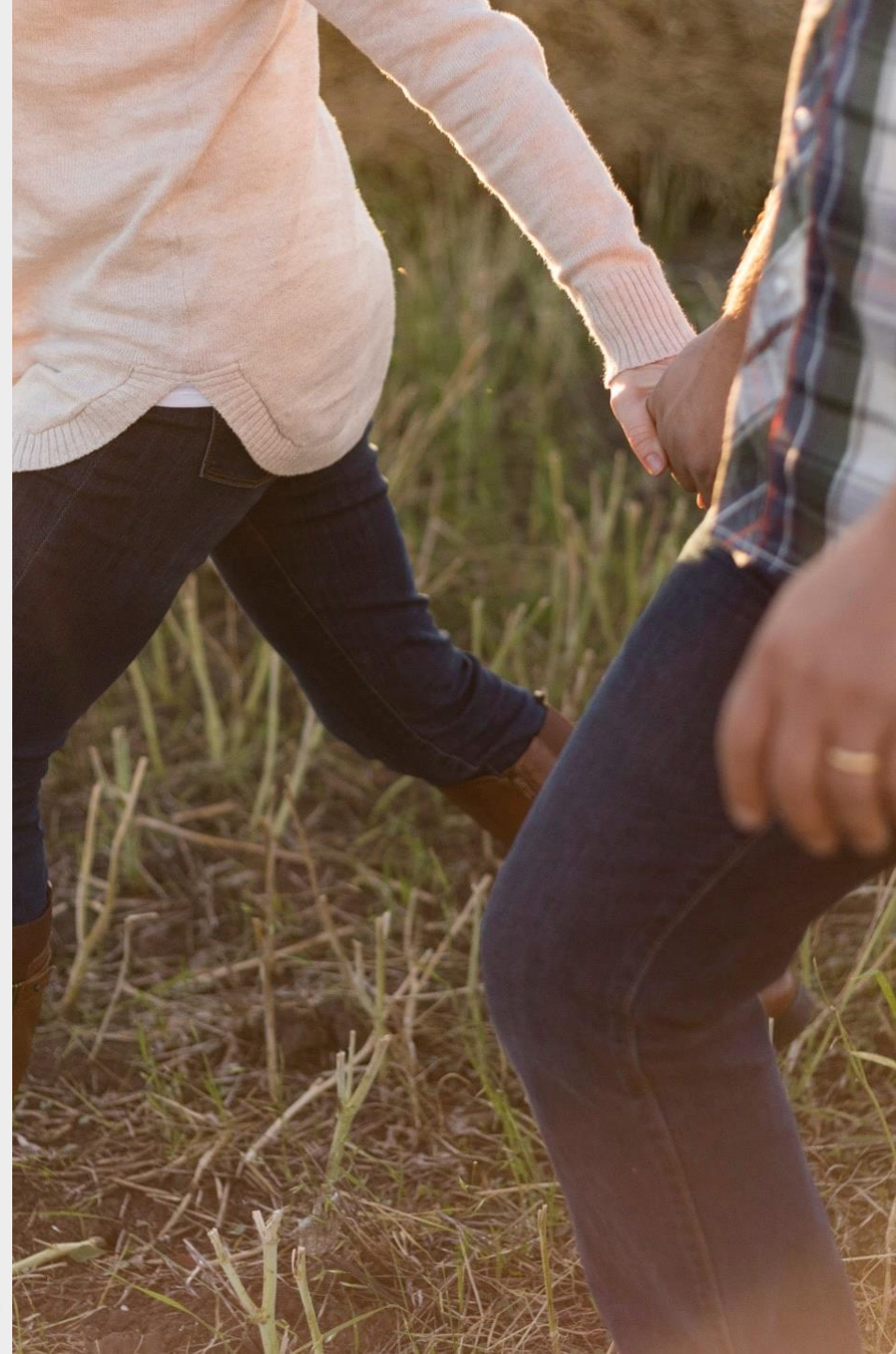
WORKING STATUS



HOUSEHOLD INCOME PER ANNUM

Base: Segment 1 Connected Adventurers n=145 Qref: S1, S2, S3, S4, P4, P5

▲ significantly higher/lower than other segments ▼



CONNECTED ADVENTURERS

UNIQUE EXPERIENCES ARE THE CORE NEED OF THIS SEGMENT

BEHAVIOUR



- + 52% partner
- + 29% family
- + 15% solo traveller



- + 48% rented car
- + 47% private vehicle
- + 46% plane

+ INTERESTED IN
Wineries, local markets, local history,
hiking/walking, health and wellness



\$288 Anticipated average
daily spend (upper range of
\$1,000 per day)



- + 38% hotel/motel
- + 37% Airbnb
- + 28% unique accom.

Eating out, taking day trips, short trips
out of town, shopping, tv/streaming,
movies, pool/beach



NEEDS & MOTIVATIONS (SEGMENT DISTINGUISHING FACTORS)

MY NEEDS

- + Travelling is about broadening my horizons and learning new things
- + Experiencing things outside of the place you live is an important part of life
- + I am easily bored if I don't have enough planned

HOLIDAY MOTIVATIONS

- + I enjoy planned tours over self-exploration
- + I often find myself booking holiday packages
- + I often worry if there will be enough to do to keep entertained



IMPORTANT FACTORS (SEGMENT DISTINGUISHING FACTORS)

- + Experiencing a new place
- + Good value for money
- + Unique experiences on offer



CONCIOUS UNWINDERS

WHO THEY ARE

Conscious Unwinders enjoy connecting with natural environments, supporting local communities and care about sustainable choices

They are more likely to be retired than other segments and friends consider them more thoughtful & responsible and least adventurous and innovative than any other segment.

WHY THEY TRAVEL

They travel, often for longer periods of time, to fully engulf themselves in where they are. They like to do this at a slower pace, sometimes relaxing with a good book on the trip.

They are interested in a WA holiday, but more so if they live in the state than interstate.

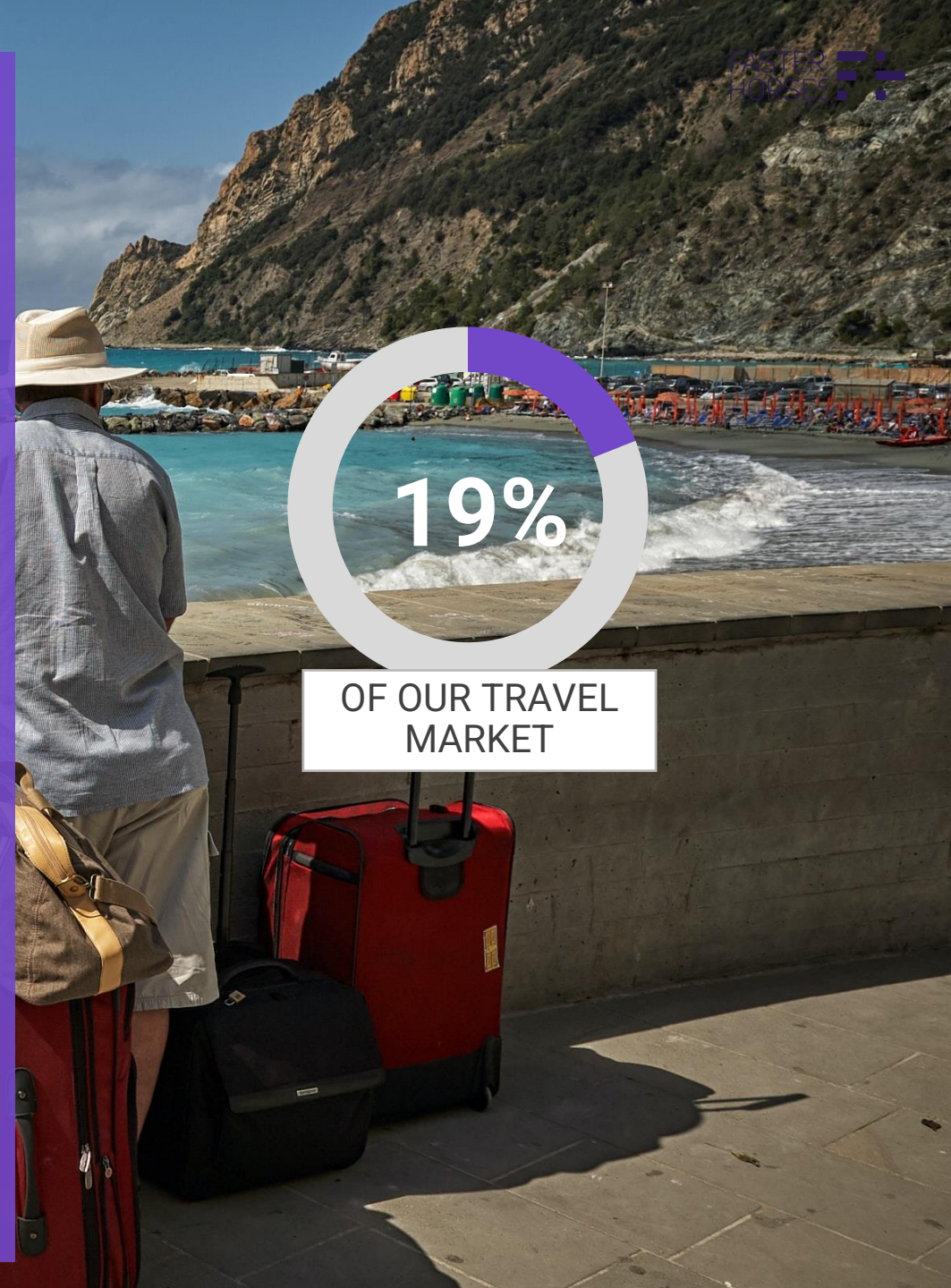
They often embark on travels to visit family and enjoy visiting familiar places. They are least likely to feel comfortable in crowds, taking risks or looking for new experiences.

HOW TO REACH THEM

Mobile, web & free to air TV, less so on apps, newspapers and magazines. They enjoy destination specific website more than any other segment and are least likely to Facebook, Instagram or YouTube

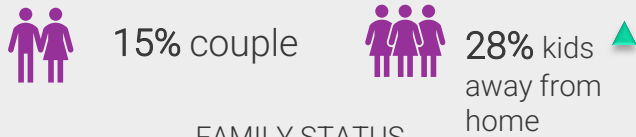
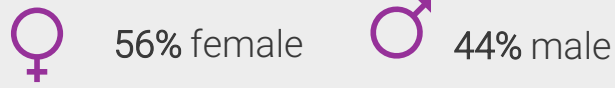
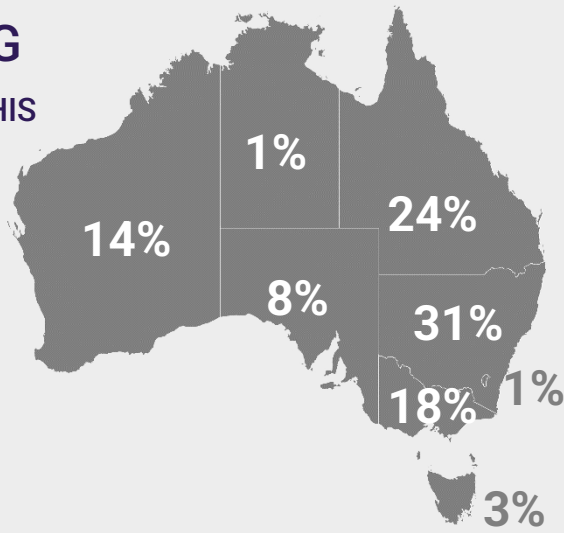


OF OUR TRAVEL MARKET

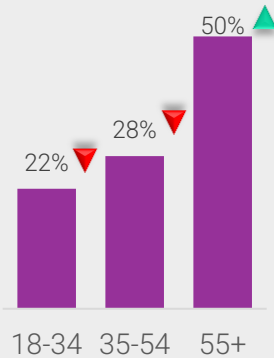


CONCIOUS UNWINDERS

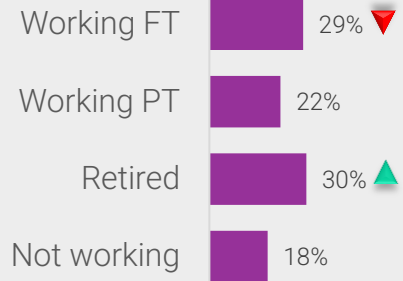
WE ARE OLDER, RETIRED OR NEARING RETIREMENT (OR HOLD A SIMILAR DESIRE FOR THIS PACE OF LIFE)



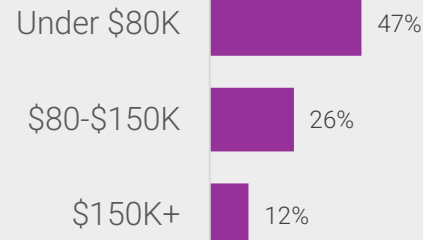
FAMILY STATUS



AGE



WORKING STATUS



HOUSEHOLD INCOME PER ANNUM

▲ significantly higher/lower than other segments ▼



CONCIOUS UNWINDERS

SUPPORTING LOCAL COMMUNITIES COMPLIMENT A DESIRE FOR INDULGENCE AND RECHARGING IN QUIETER SETTINGS

BEHAVIOUR



- + 48% partner
- + 22% family
- + 19% solo traveller



- + 46% plane
- + 42% rented car
- + 42% private vehicle

+ INTERESTED IN
Wineries and breweries, **local markets**,
learning about **local history**, Dark Sky
Tourism activities, hiking/walking,
wildflowers
Eating out, **TV/streaming, reading**, short
trips away, day trips



\$257 Anticipated average
daily spend (upper range of
\$600 per day)



- + 44% hotel/motel
- + 37% Airbnb
- + 36% guest house/B&B



NEEDS & MOTIVATIONS (SEGMENT DISTINGUISHING FACTORS)

MY NEEDS

- + I need more than a long weekend to truly recharge my batteries
- + Covid-19 travel restrictions have increased my desire to support local communities
- + I am concerned about the environmental impact of tourism
- + I like revisiting past holiday destinations I have enjoyed

HOLIDAY MOTIVATIONS

- + Nice accommodation is an important part of a trip
- + I prefer saving up for one large trip a year over several short breaks
- + I enjoy revisiting familiar places



IMPORTANT FACTORS (SEGMENT DISTINGUISHING FACTORS)

- + Good value for money
- + Away from crowds or popular tourist centres
- + Stunning scenery and natural settings



INDULGERS

WHO THEY ARE

Indulgiers are the youngest segment and one of the biggest, are most likely to be single and living with friends and family. Conversely, they are least likely to have children.

WHY THEY TRAVEL

They value comfortable travel and don't travel too often as they are busy working. If they go on a trip, they don't like watching their budget too much and make their trip a memorable one, yet want their expenses to stretch further.

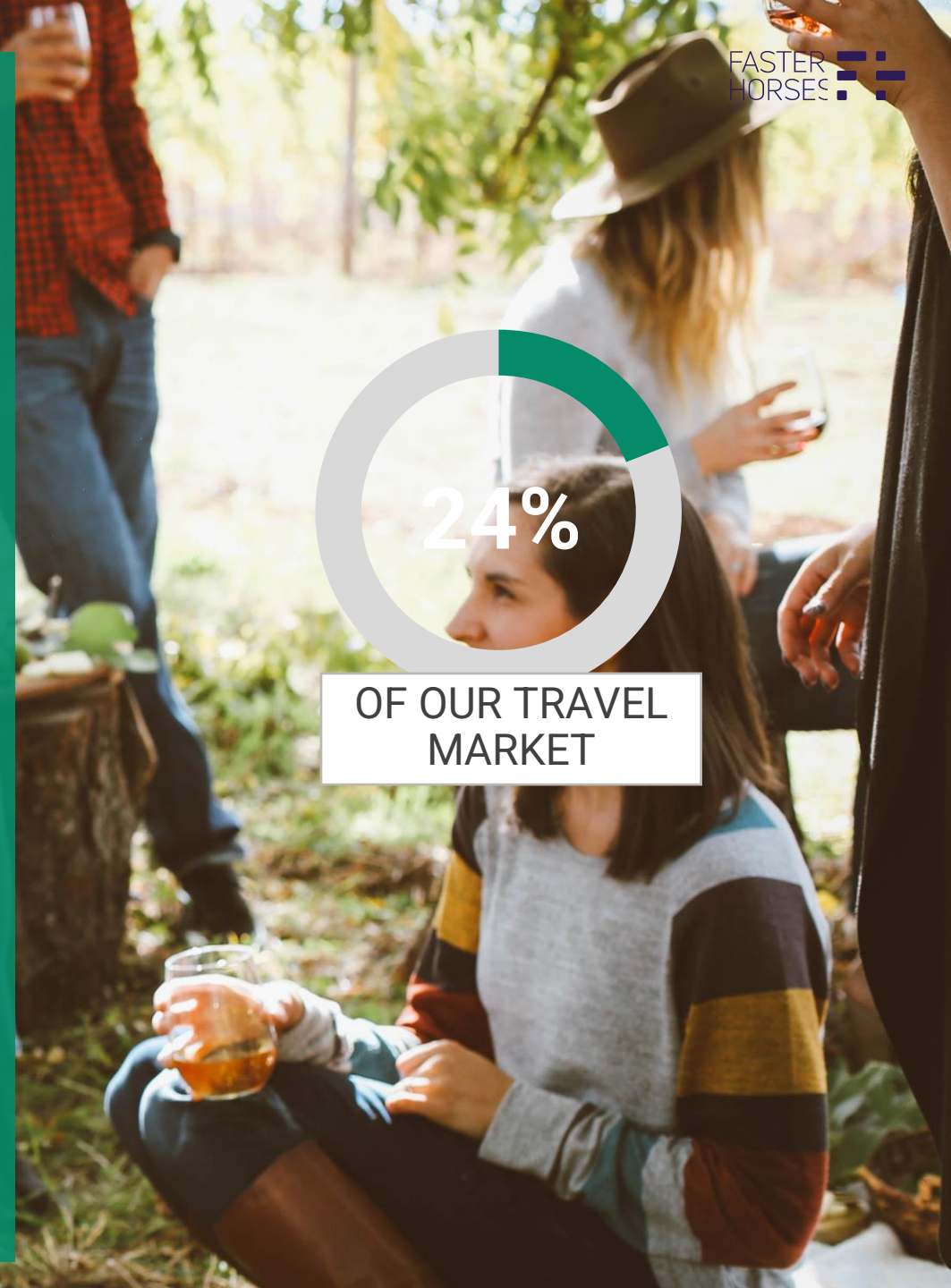
Compared to other segments, Agritourism is of lower interest to them; they gravitate to warmer weather and would like to combine trips with visiting friends & family.

They are easily bored and worry there may not be enough to do to keep them entertained.

They are less interested in learning new things, the environment or support my local community

HOW TO REACH THEM

Facebook, YouTube & Instagram, but less likely on LinkedIn, Twitter, radio & Free to Air TV



INDULGERS

WE ARE YOUNG OR YOUNG AT HEART



46% female



54% male



33% single



32% kids

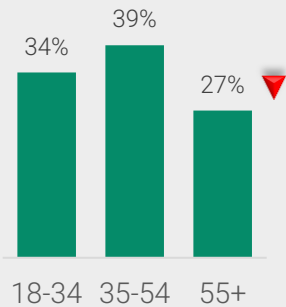
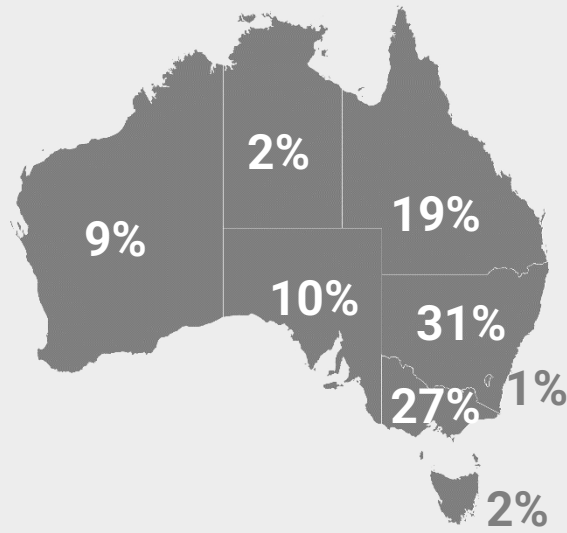


17% couple

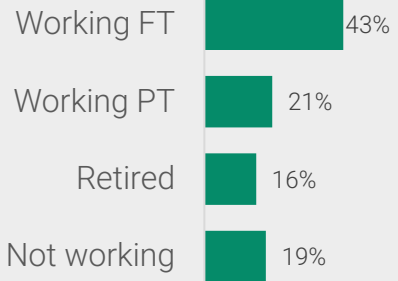


17% kids
away from
home

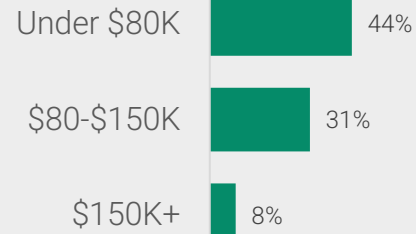
FAMILY STATUS



AGE



WORKING STATUS



HOUSEHOLD INCOME
PER ANNUM

▲ significantly higher/lower
than other segments ▼



INDULGERS

JUST STARTING OUT IN TRAVEL EXPERIENCES (SEEM TO BE LESS FOCUSED ON THINGS THAT SHOULD BE A PART OF AN EXPERIENCE AND MORE ON A BUDGET)

BEHAVIOUR



- + 44% partner
- + 25% family
- + 17% solo traveller
- + 17% others (no kids)



- + 45% private vehicle
- + 42% plane
- + 36% rented car

+ INTERESTED IN
Local markets, visiting wineries & breweries



\$249 Anticipated average daily spend (upper range of \$1,000 per day)



- + 41% luxury hotel ▲
- + 37% hotel/motel
- + 34% Airbnb

Eating out, going to movies, tv/streaming, shopping, short trips away, pool/beach



NEEDS & MOTIVATIONS (SEGMENT DISTINGUISHING FACTORS)

MY NEEDS

- + Holidays are about indulgence, so I don't watch my spending too closely when I travel
- + I am easily bored if I don't have enough planned

HOLIDAY MOTIVATIONS

- + I often worry there will be enough to do to keep entertained
- + I spend a large proportion of my leave visiting friends and family
- + I often find myself booking holiday packages



IMPORTANT FACTORS (SEGMENT DISTINGUISHING FACTORS)

- + A sense of familiarity and safety
- + Availability of high-quality accommodation
- + The ability to combine it with visiting friends & family



GREY-ING WANDERERS

WHO THEY ARE

Grey-ing Wanderers are a little older than the average traveller and often have older children living at home, or are empty nesters.

They are more likely to be female and more active and extroverted than other segments

WHY THEY TRAVEL

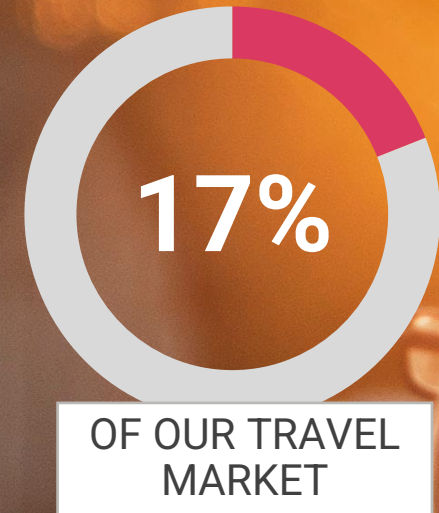
They travel to appreciate life, experience things outside their current environment and broaden their horizons. They have a growth mindset and are quite spontaneous, so not very likely to plan trips well in advance or visit places they have been before.

Even though they like to explore, they don't worry about not having enough to do. They take things as they come, and enjoy every experience along the way.

They are very interested in Agritourism, although not quite as much as Family Explorers, yet are interested in a wider range of activities than they are, especially local markets, learning about history, hiking indigenous experiences and hands on experiences (cooking, art, dance poetry).

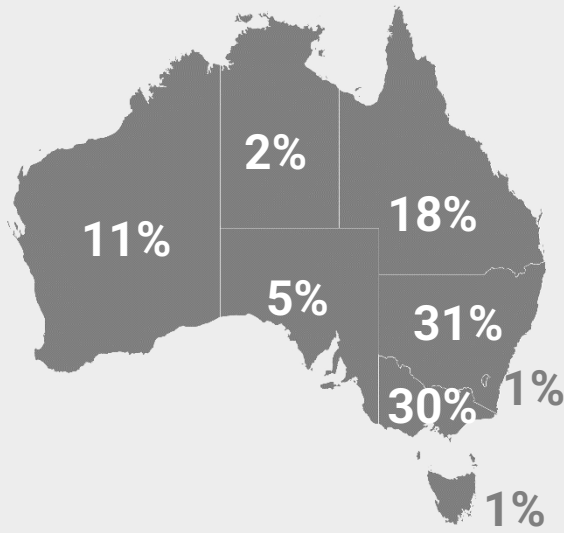
HOW TO REACH ME

Classic internet via mobile or PC, Facebook, Instagram and YouTube. They particularly like to talk to people about their past trips and exchange experiences along the way



GREY-ING WANDERERS

WE ARE OLDER BUT NOT QUITE AT RETIREMENT (+ FEMALE PERSPECTIVE)

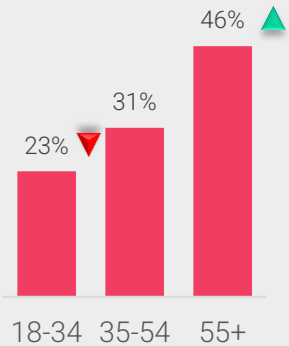


63% female ▲ 37% male ▼

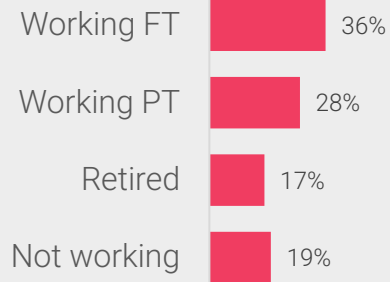
23% single 27% kids

18% couple 29% kids away from home

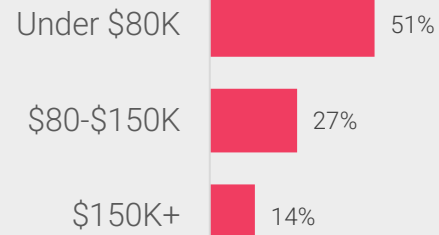
FAMILY STATUS



AGE



WORKING STATUS



HOUSEHOLD INCOME PER ANNUM



GREY-ING WANDERERS

LOWER SPEND AND BUDGET CONSCIOUS, BUT WANT BOTH SIMPLE AND INTERESTING EXPERIENCES

BEHAVIOUR



- + 53% partner
- + 24% family
- + 18% friends / relatives (no kids)



- + 50% rented car
- + 49% private vehicle
- + 46% plane

+ INTERESTED IN
Local markets, wineries/breweries, local history, Dark Sky tourism, hiking/walking, indigenous culture, food growers/wine makers, wildflowers



\$250 Anticipated average daily spend (upper range of \$850 per day)



- + 42% Airbnb
- + 38% hotel/motel
- + 34% guest house/B&B
- + 28% caravan/ camper

Eating out, **day trips, short trips away, bushwalks**, pool/beach, tv/streaming, reading, **art/museums**



NEEDS & MOTIVATIONS (SEGMENT DISTINGUISHING FACTORS)

MY NEEDS

- + Experiencing things outside of the place you live is an important part of life
- + Travelling helps me appreciate my everyday life
- + Travelling is about broadening my horizons and learning new things
- + Travel is about connection- with others or with my surroundings

HOLIDAY MOTIVATIONS

- + I enjoy long road trips
- + I don't mind 'roughing' it a little when I travel



IMPORTANT FACTORS (SEGMENT DISTINGUISHING FACTORS)

- + Experiencing a new place
- + Ability to learn about the place I am visiting
- + Stunning scenery and natural settings



FAMILY EXPLORERS

WHO THEY ARE

Family Explorers are likely between 35-44 years old and there's 1 in 2 chance they have a child under 18 at home.

They are well educated, skew male and have an adventurous nature. They have travelled Australia a fair bit, even recently, especially to Tasmania, Northern Territory or within WA.

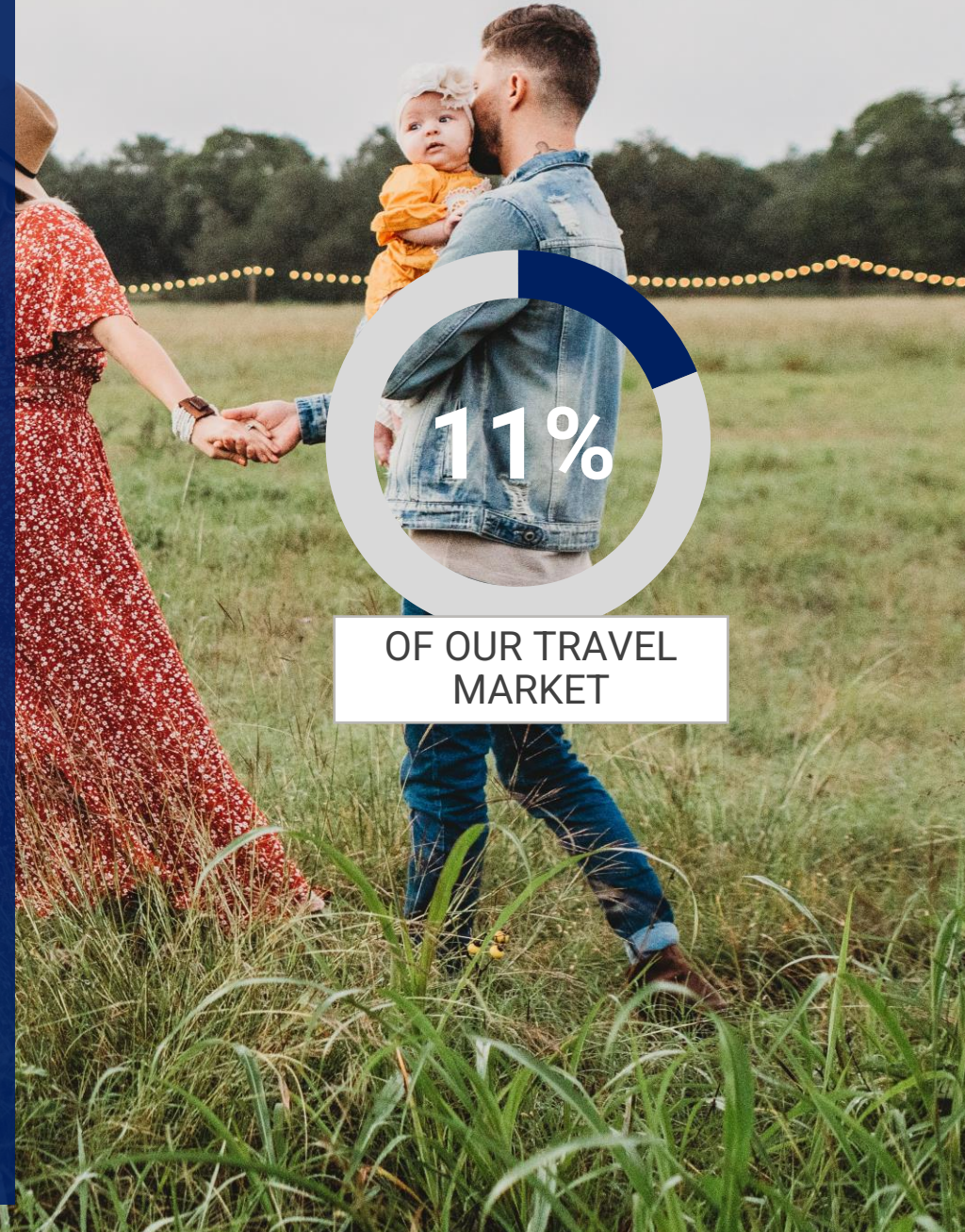
WHY THEY TRAVEL

They like spending time near the coast, more so than any other segment, and enjoy mixing with the locals. They like having a full itinerary and don't mind pushing themselves out of their comfort zone and trying new activities in places they have been to before. Having said that, since they often have a young family, they mix these experiences with those that the travel party will enjoy.

Agritourism appeals to them very much, not necessarily just because it is something different, but because it inspires them with new ideas and teaches them (and their kids) about where our food is sourced.

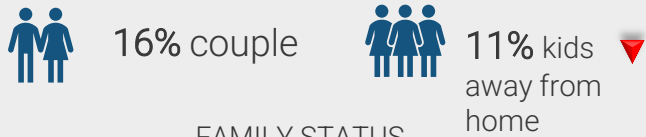
HOW TO REACH THEM

They are very active across most media channels but mostly use internet via mobile or PC, Apps or Free to air TV. They are also more likely than any other segments to use travel guides, travel agents and get inspired by print inserts.

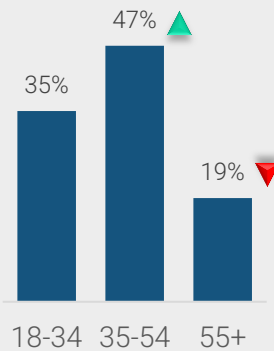


FAMILY EXPLORERS

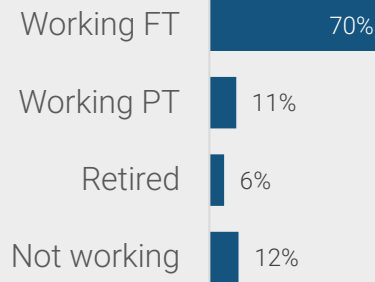
WE REPRESENT THE FAMILY (+ MALE PERSPECTIVE)



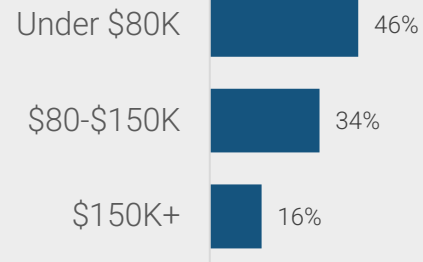
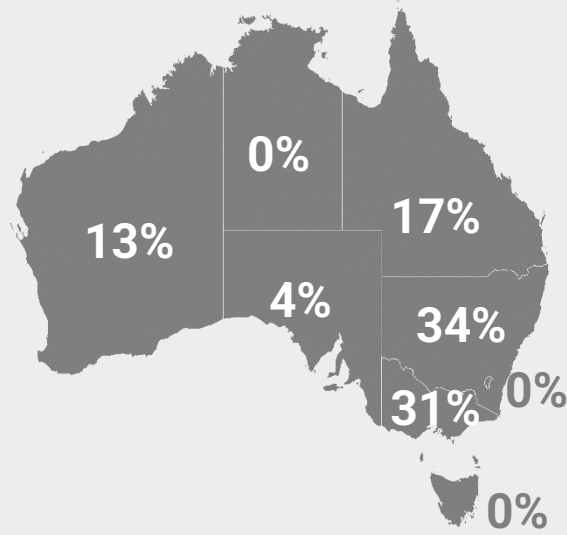
FAMILY STATUS



AGE



WORKING STATUS



HOUSEHOLD INCOME PER ANNUM

▲ significantly higher/lower than other segments ▼



FAMILY EXPLORERS

UNIQUE EXPERIENCES, COMBINED WITH A RANGE OF ACTIVITIES TO REALLY ENJOY THE TRAVEL MOMENT TOGETHER

BEHAVIOUR



- + 44% family ▲
- + 35% partner
- + 24% solo traveller



- + 50% private vehicle
- + 40% plane
- + 38% rented car

+ INTERESTED IN
Local markets, wineries/breweries,
hiking/walking, **fruit picking**, food
growers/wine makers, Dark Sky Tourism



\$393 Anticipated average
daily spend (upper range of
\$2,000 per day)



- + 37% Airbnb
- + 33% unique accom.
- + 30% hotel/motel

Shopping, pool/beach, eating out, day
trips, short trips, tv/streaming, zoo,
movies



NEEDS & MOTIVATIONS (SEGMENT DISTINGUISHING FACTORS)

MY NEEDS

- + I need a drastic change in scenery to fully switch off
- + I constantly look for ways to push myself out of my comfort zone, so I grow as a person
- + I prefer my holidays to include a wide range of activities
- + Staying spontaneous while I travel is important

HOLIDAY MOTIVATIONS

- + I enjoy planned tours over self-exploration
- + I often find myself booking holiday packages
- + I enjoy revisiting familiar places



IMPORTANT FACTORS (SEGMENT DISTINGUISHING FACTORS)

- + Ability to spend time by the beach or coast
- + Opportunities to meet local people and communities
- + A vibrant atmosphere
- + The ability to combine it with visiting friends & family





05

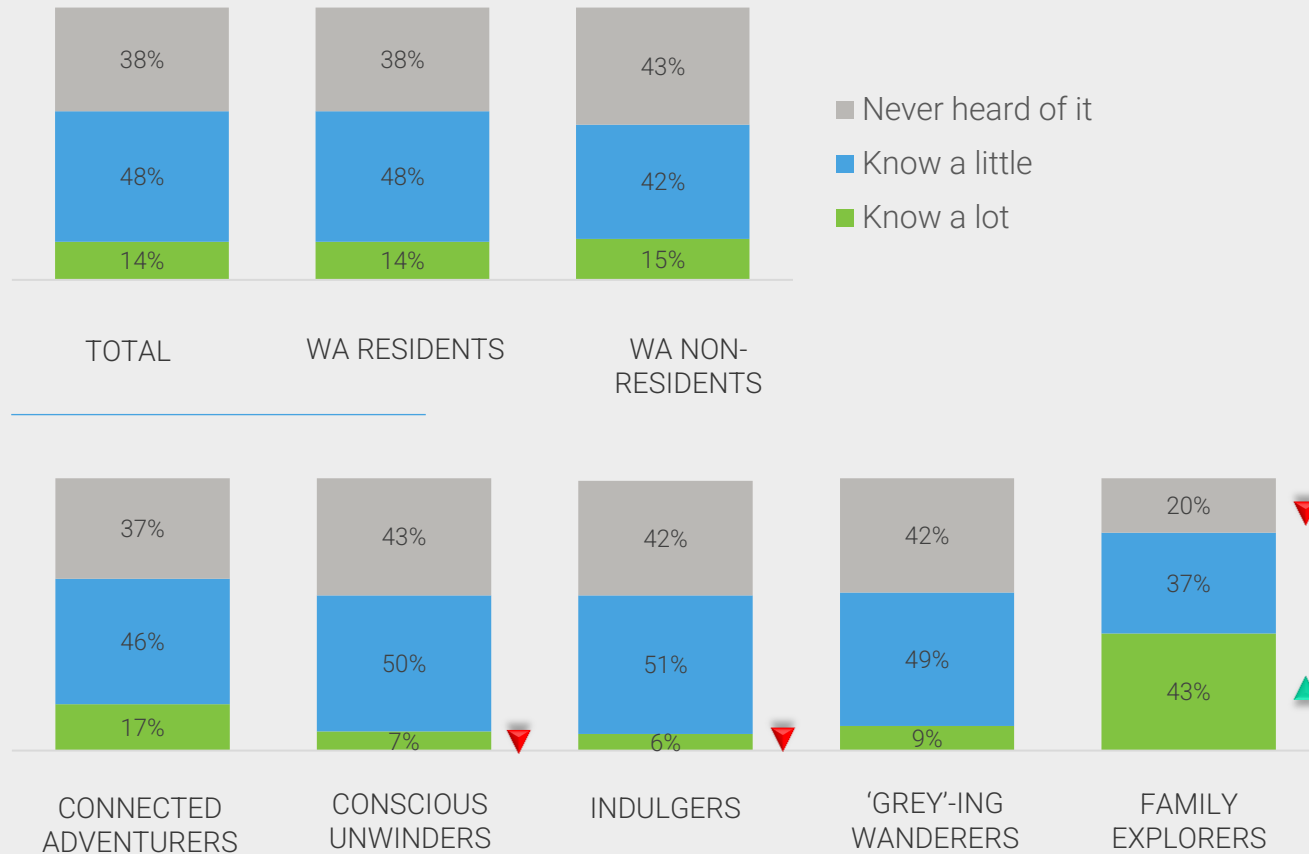
WA AGRITOURISM

AGRITOURISM AS A TOURIST ACTIVITY CAN BE DEDUCED FROM THE NAME, BUT MAY MISS THE MARK ON RESONATING WITH THE CORE AUDIENCE

- + Many have not heard of the term, but can deduce its meaning
- + The term 'Tourism' was seen as a 'dirty' word for some, tainting the appeal of the concept for some of the environmentally friendly respondents
 - + Perception a lot of rubbish is produced in the process
 - + Perception of mass marketing and less tailored experiences
- + When introduced, most appealing activities (fruit picking, education, cellar door, tasting, 'farm to plate') were not synonymous with Agritourism
 - + → also rarely considered a 'longer stay' holiday but rather a day time activity



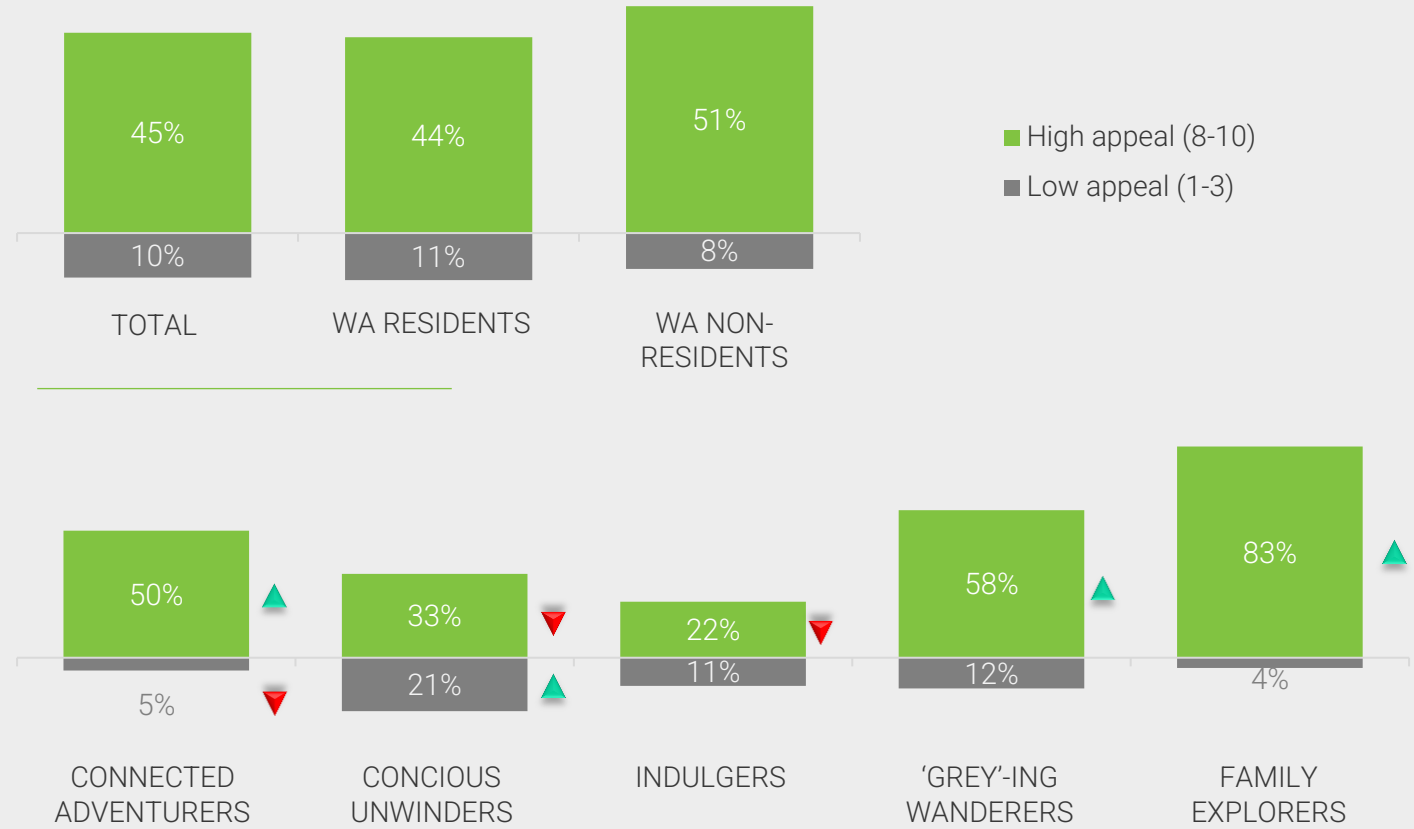
'FAMILY EXPLORERS' KNOW THE MOST ABOUT AGRITOURISM WITH 'CONCIOUS UNWINDERS' AND 'INDULGERS' KNOWING THE LEAST





Base: Connected Adventurers (361) Conscious unwinders (267) Indulgents (289) Grey-ing Wanderers (224) Family Explorers (140) Qref. AG1. How much, if anything, do you know about the term Agritourism?

▲ significantly higher/lower than other segments ▼

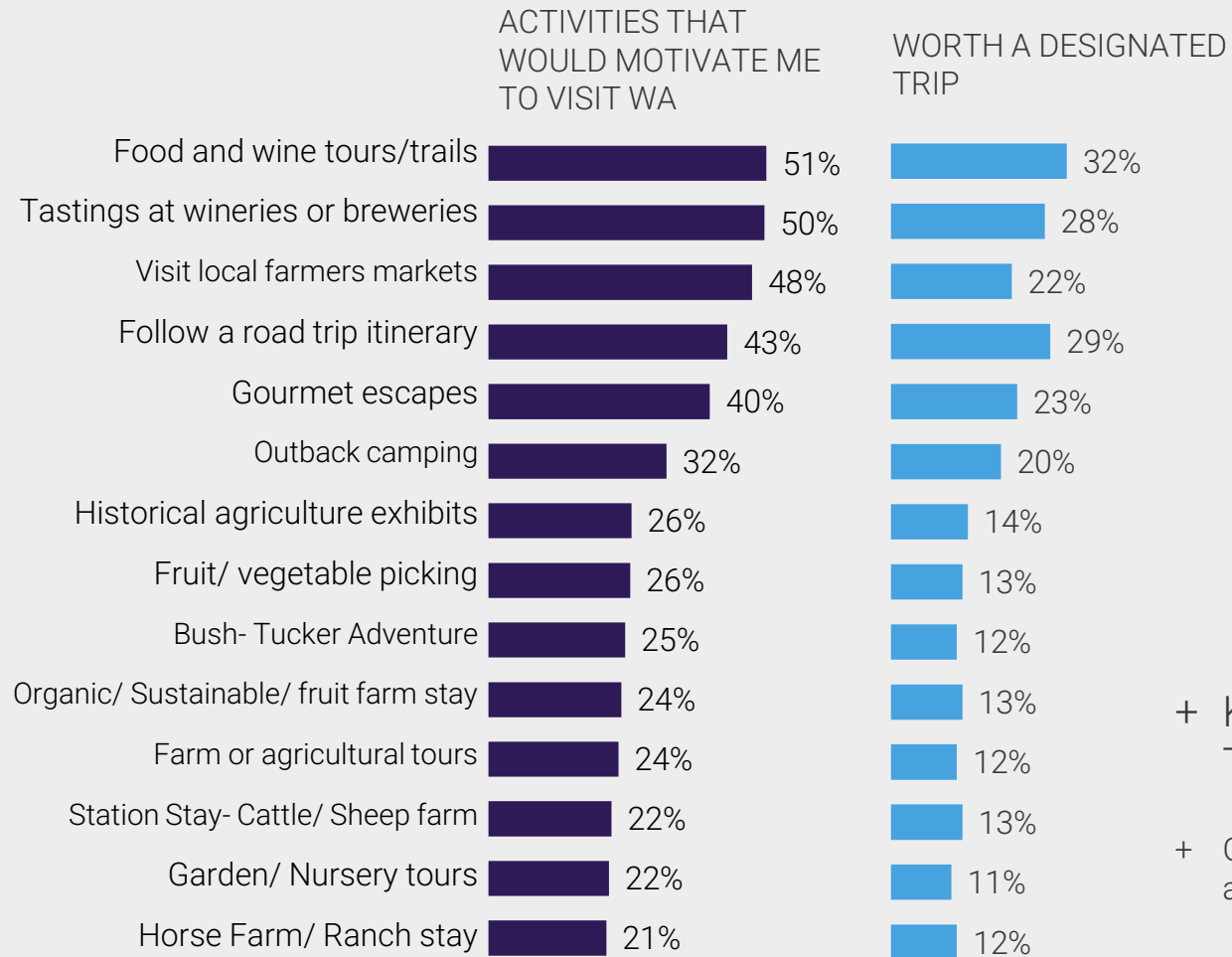
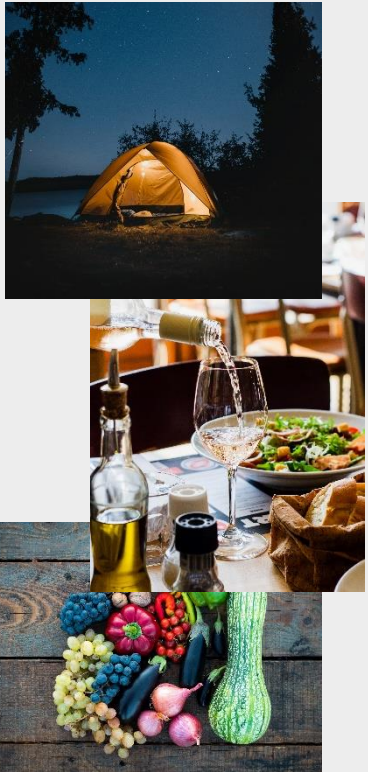
WA AGRITOURISM IS A HIGHLY APPEALING CONCEPT – ESPECIALLY FOR ‘FAMILY EXPLORERS’, ‘CONNECTED ADVENTURERS’ AND ‘GREY-ING WANDERERS’



Base: Total n=1,281 Qref. AGWA1 How appealing does this type of trip in Western Australia sound to you?

 significantly higher/lower than other segments 

FOOD AND WINE TRAILS AND ROAD TRIP ITINERARIES HOLD APPEAL AS THEY FURTHER ALLOW EXPOSURE TO DIFFERENT LANDSCAPES AND EXPERIENCES THAT WA BROADLY HAS TO OFFER



+ KEY APPEAL FOR INTERSTATE TRAVELLERS

- + Approximately one third of interstate travellers would consider it worth taking a designated trip to Western Australia to follow a food and wine trail / tour or road trip itinerary
- + These longer planned experiences have the potential to integrate other components that are considered motivating in identifying a destination including tastings (50% activity that would motivate me), historical agricultural exhibits (26%), fruit and vegetable picking (25%), bush tucker adventure (25%), organic / sustainable / fruit farm stay (24%) and farm or Agricultural tours (24%)

+ KEY APPEAL FOR INTRASTATE TRAVELLERS

- + Generally intrastate travellers find similar experiences appealing in their choice to visit WA
- + Although at a lower level, Garden and Nursery tours would be more motivating for residents to travel intrastate (28% v. 21%) compared to interstate

Base: Total n=1,281 Qref. AGWA2. Which of these activities would motivate you to visit WA?
 AGWA3. ... And which experience do you think is worth taking a designated trip to Western Australia? (REBASED BACK TO TOTAL SAMPLE)

FARMERS MARKETS, FOOD & WINE/BEER EXPERIENCES ARE COMMON EXPERIENCES WITH ‘GREY-ING WANDERERS’ AND ‘FAMILY EXPLORERS’ BEING MORE ENGAGED IN AGRI-RELATED ACTIVITIES

CONNECTED ADVENTURERS



PAST EXPERIENCES

- + 59% local farmers markets
- + 58% tastings at wineries / breweries
- + 46% food / wine tours and trails
- + 40% road trip itinerary
- + 36% fruit / vegie picking
- + 33% Outback camping
- + 29% Garden/ Nursery tours
- + 24% Historical agriculture exhibits
- + 21% Gourmet escapes
- + 20% Farm or Agricultural tours

CONSCIOUS UNWINDERS



PAST EXPERIENCES

- + 66% local farmers markets
- + 61% tastings at wineries / breweries
- + 39% food / wine tours and trails
- + 35% road trip itinerary
- + 33% outback camping
- + 25%Garden/ Nursery tours
- + 23% Historical agriculture exhibits
- + 20% Fruit/ vegetable picking ▼
- + 15%Gourmet escapes
- + 14% Farm or Agricultural tours

INDULGERS



PAST EXPERIENCES

- + 48% tastings at wineries / breweries ▼
- + 44% local farmers markets ▼
- + 37% food / wine tours and trails
- + 32% outback camping
- + 32% fruit / vegie picking
- + 25% Follow a road trip itinerary ▼
- + 18% Garden/ Nursery tours ▼
- + 14% Historical agriculture exhibits
- + 14% Gourmet escapes
- + 10% Horse Farm/ Ranch stay

‘GREY’-ING WANDERERS



PAST EXPERIENCES

- + 74% local farmers markets ▲
- + 69% tastings at wineries / breweries ▲
- + 50% food / wine tours and trails
- + 45% road trip itinerary ▲
- + 39% outback camping
- + 26% Garden/ Nursery tours
- + 25% Historical agriculture exhibits
- + 25% Fruit/ vegetable picking
- + 19% Farm or Agricultural tours
- + 15% Gourmet escapes

FAMILY EXPLORERS



PAST EXPERIENCES

- + 55% local farmers markets
- + 50% fruit / vegie picking ▲
- + 47% food / wine tours and trails
- + 44% tastings at wineries / breweries ▼
- + 42% road trip itinerary
- + 37% Outback camping
- + 36% Organic/ Sustainable/ fruit farm stay ▲
- + 36% Garden/ Nursery tours ▲
- + 32% Gourmet escapes
- + 31% Historical agriculture exhibits

▲ significantly higher/lower than other segments ▼

'GREY-ING WANDERERS' AND 'FAMILY EXPERIENCERS' ARE THE SEGMENTS MORE MOTIVATED TO DO A DESIGNATED AGRITOURISM THEMED HOLIDAY IN WESTERN AUSTRALIA

CONNECTED ADVENTURERS



CONSCIOUS UNWINDERS



INDULGERS



'GREY'-ING WANDERERS



FAMILY EXPLORERS



WORTH DESIGNATED TRIP TO WA...



- 30% food and wine tours / trails
- 29% road trip itinerary
- 28% Tastings at wineries or breweries
- 25% Visit local farmers markets
- 22% Gourmet escapes

- 29% food and wine tours / trails
- 27% road trip itinerary
- 26% Food and wine tours/trails
- 24% Gourmet escapes
- 15% Visit local farmers markets

- 27% food and wine tours / trails ▼
- 21% tastings at wineries / breweries
- 19% Follow a road trip itinerary ▼
- 19% Gourmet escapes
- 15% Outback camping

- 44% road trip itinerary ▲
- 44% food and wine tours / trails ▲
- 35% Tastings at wineries or breweries ▲
- 33% Visit local farmers markets ▲
- 29% Gourmet escapes

- 43% food and wine tours ▲
- 34% organic / sustainable / fruit farm stay ▲
- 31% Visit local farmers markets ▲
- 31% Tastings at wineries or breweries
- 31% Farm or agricultural tours ▲



06

**TOP WA AGRITOURISM
LOCATIONS
(BY EXPERIENCE)**

A COASTAL WINE EXPERIENCE COMBINES KEY DESIRED FACTORS OF WINE, FOOD AND LANDSCAPE MAKING IT A PARTICULARLY APPEALING EXPERIENCE



Exploring a coastal wine region, where you can enjoy gourmet farm to plate meals, and taste award winning wine

"It's our most favourite holiday activity – "Surf and Turf" to coin a phrase"

"Sounds fabulous, we both enjoy wine and love the coast and paired with gourmet meals it would be a favourite trip"

"It sounds pleasant and relaxing, allowing travel and food"

"I would love to explore a coastal wine region as I love Australian wines and having the ability to have the wine with gourmet food sounds like a fantastic experience"

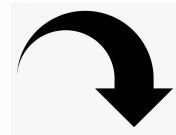
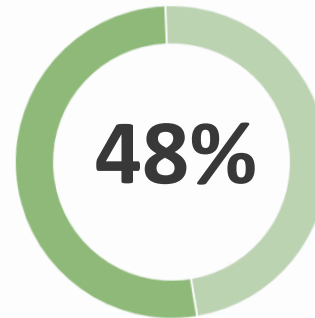
"It has the things I love – the coast, good quality fresh food and nice wine"

"Sounds like it has elements of indulgence which is important for a holiday! We love the beach"

PARTICULARLY APPEALING FOR



- Grey-ing Wanderers (73%)
- Family Experiencers (85%)
- Married (64%)



OF THE MARKET FINDS THIS DESTINATION APPEALING

A SIMPLISTIC BEACHSIDE OFFERING THAT ALSO PROVIDES CONNECTION TO WHERE FOOD COMES FROM



A coastal destination stay, buying freshly picked organic fruit at farm gates and eating fresh fruit ice-cream direct from the farmer

"Love beach holidays and healthy eating"

"This is my idea of heaven, not to everyone's taste but I am limited by my disabilities and simple seems to work best for me"

"I love the beach and knowing that I will be supporting the businesses directly while going on this relaxed trip sounds great"

"It's less interactive than the other ideas and as such offers more freedom to travel and explore where I want to go"

"I want my children to see how food grows"

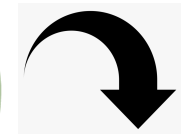
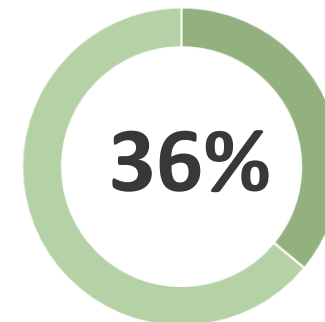
"I love fruit and haven't been on a fruit farm recently, love the coast and love swimming!"

"Because it would align agritourism with a coast destination and I love beaches"

PARTICULARLY APPEALING FOR

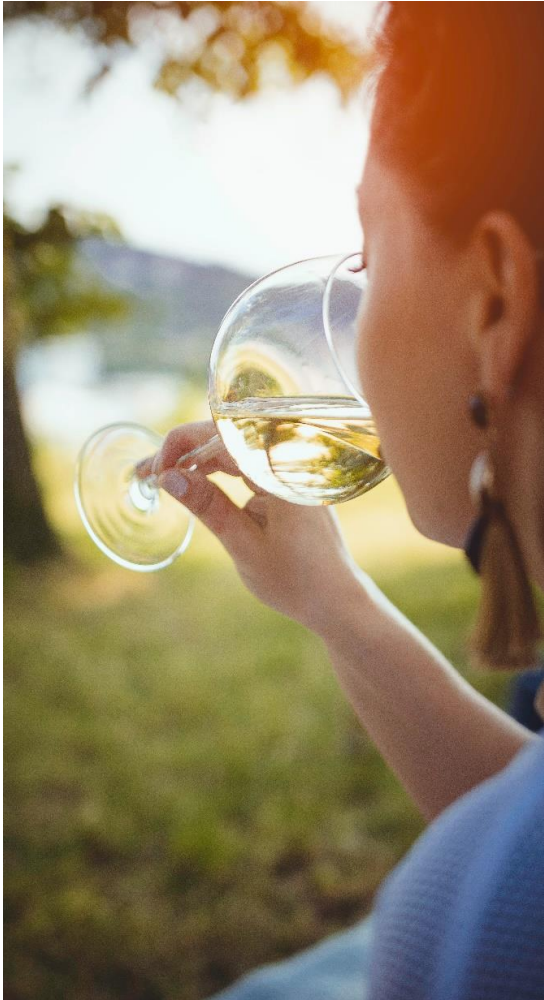


- Family Experiencers (87%)
- Grey-ing Wanderers (66%)
- Connected Adventurers (57%)
- Single parent family (58%)



OF THE MARKET FINDS THIS DESTINATION APPEALING

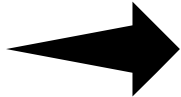
HAVING EASILY ACCESSIBLE AND SHORT TRIP AGRITOURISM OPTIONS THAT STILL HAVE ‘SOMETHING SPECIAL’ IS IMPORTANT



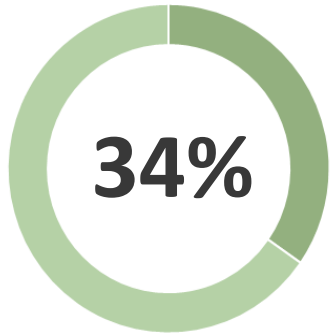
A wine tasting region surrounded by rolling hills, within a short drive from the city

- "We recently visited Margaret River, WA and we loved it"*
- "It's the kind of trip that can be taken even if you haven't got a huge amount of time"*
- "Tasting different wines and seeing different scenery appeals to me"*
- "Easy access from entry to state, I enjoy wine and country locations"*
- "Sounds very happy, inviting and love wineries"*
- "Not too far to travel and trying different wines ... relaxing"*
- "I'm interested in wine tourism and being near the city is important to me"*
- "I love wine and scenery especially when close to home"*

PARTICULARLY APPEALING FOR



- Family Experiencers (84%)
- Grey-ing Wanderers (65%)
- Married (58%)
- Have a child in household (59%)



OF THE MARKET FINDS THIS DESTINATION APPEALING

Base: Total n=1,281 Qref. CP1- CONCEPTS "How appealing do you consider.
CP3 Thinking of the trip you ranked as your favourite (1). Why did you choose this particular trip?

THE UNIQUENESS OF THIS EXPERIENCE SPEAKS STRONGLY TO MANY TRAVELLERS



Experiencing authentic stations stay life in a remote, vast wilderness with dramatic rock formations and natural pools to explore nearby

"Rock formations, vast wilderness and natural pools are the things that attracted me ... these are scenes I cannot access at home and would be the sole reason for me travelling here"

"I'm attracted to the Red Centre it is an exhilarating experience"

"Because it would be a natural experience with my family. We enjoy nature a lot"

"This is a more authentic and unique experience"

"I enjoy natural pools as a way of connecting to nature and cherish the remote lifestyle"

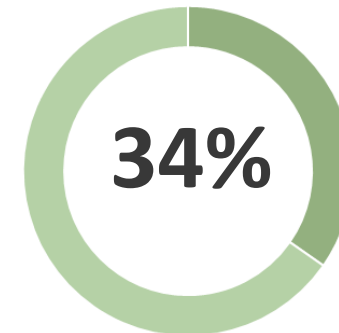
"It sounds magical. True Australiana"

"It would be a very sensory experience – sounds, colours and scenery"

PARTICULARLY APPEALING FOR



- Family Experiencers (82%)
- Grey-ing Wanderers (60%)
- Child in household (49%)



OF THE MARKET FINDS THIS DESTINATION APPEALING

THE CONCEPTS OF SIMPLE AND LOCAL RESONATE WITH THIS IDEA



Staying on a family-owned fruit/veggie farm where you can pick your own food, visit the animals - close proximity to walking / cycling trails

"It sounds extremely relaxing. I feel a local family would also be able to give you a lot of good ideas and tips for your trip"

'Connecting with people and experiencing the farm"

"It's a family owned business, it's eco friendly and cycling trails are fun in vacations"

"I think this would be very comfortable because it would be well cared for and family maintained"

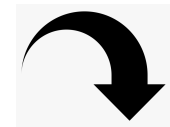
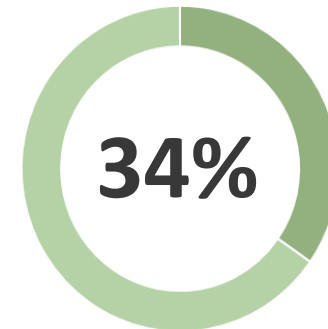
"Sounds very interesting and reminds me of my childhood life growing up on a diary farm"

"It represents a lifestyle that I have always wanted to do when I was younger. It also has animals, and walking tracks which gives one the chance to explore the countryside"

PARTICULARLY APPEALING FOR



Family Experiencers (79%)
 Grey-ing Wanderers (48%)
 Connected Adventurers (45%)
 Aged under 55yrs (42%)
 Married (44%)
 Child in household (52%)
 Working full time (44%)



OF THE MARKET FINDS THIS DESTINATION APPEALING

THE AUTHENTICITY AND UNIQUE NATURE OF A TRADITIONAL CATTLE STATION WAS APPEALING FOR A NICHE SECTION OF THE MARKET



A traditional cattle station stay where you can participate in authentic farm life with broad, uninterrupted views of the Australian outback

"Show my daughter and wife true farm life and what goes into producing the meat and veg that we eat"

"I find the agricultural industry very inspiring and would love to see the day to day activities of running a cattle station"

"Because its an authentic outback experience – unique. Get to experience a different way of life"

"I love the outback and feel that this is where I really belong. This is where my heart and soul are"

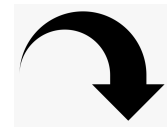
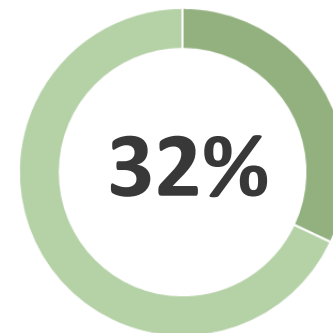
"Seems like a very real experience, dust, cattle, dung smell, outback views"

"Sounds like it would be a good experience and push me out of my comfort zone"

PARTICULARLY APPEALING FOR



Family Experiencers (78%)
 Aged under 55yrs (35%)
 Married (38%)
 Child in household (45%)



32% OF THE MARKET FINDS THIS DESTINATION APPEALING



THANK YOU

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