



Agritourism Markets **Can Support Food Systems Transformation**

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OVERVIEW

I. What is Agritourism?

II. What are Agritourism's market drivers?

III. Relevance of Agritourism to Sustainable Food Systems?





**WHAT IS
AGRITOURISM?**

- Broadly stated, Agritourism (AT) can be thought of as the nexus between the agriculture & tourism sectors
- Diverse commercial activities that connect domestic & international travelers to where their food comes from.



WHAT IS AGRITOURISM?

- In some cases, it involves farm to table meals at dining establishments that are highly connected to the local food system
- In other cases, it could be on-farm experiences (educational, entertainment, relaxation) re production, harvesting, consumption of food





WHAT IS AGRITOURISM?

Regardless of definition, for the purposes of our initiative, it must entail at least 5 factors:

1. Increases farm incomes
2. Engenders creation of sustainable jobs linking ag & tourism sectors
3. Promotes cultivation of diverse/nutrient-laden foods
4. Promotes environmental conservation
5. Attracts the public to visit or be aware of agricultural operations





**AGRITOURISM'S
MARKET
DRIVERS?**

- **A broken food system, on the one hand,**
- **Increasing health awareness, social & environmental consciousness, on the other hand,**

AGRITOURISM (A-T) MARKET DRIVERS

Broken Food System, characterized by:

- Food production dominated by large multinational corporations;
- Mass production of cheap, high-caloric, low nutritional food
- Limited availability; high-cost of nutrient dense food
- High rates of mono-cropping; lack of food diversity
- Low-value, unsustainable jobs for majority employees in the ag space

Increasing Awareness, characterized by:

Increasing numbers of consumers/travelers, conscious about:

- Their health & well-being (reinforced by COVID-19)
- Social issues, such as fair trade, working conditions
- Environmental conservation



AGRITOURISM MARKET DRIVERS – THE WELLNESS ECONOMY

- The global wellness economy was a US\$4.5 trillion market in 2018
- The industry grew by 6.4% annually from 2015-2017, nearly twice as fast as global economic growth as a whole
- Among the top wellness markets, by revenue, in which agriculture plays a key role include:
 - healthy eating & nutrition (US\$702 billion)
 - wellness tourism (US\$639 billion)





A-T MARKET DRIVERS – TRAVELERS' PERCEPTION SURVEY

Demographic summary of respondents

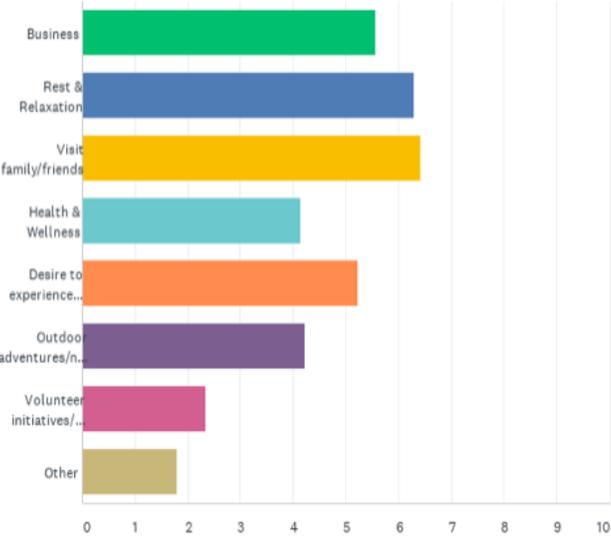
- Female (66%); Male (32%) No ID (2%)
- Majority between the ages of 35-64 (88%)
- Most had a masters degree (52%); undergraduate (22%); post-graduate (11%)
- Income range (US\$/equivalent): 100K-150K(28%); 50K-75K (21%); 30K-50K (19%); 15K-30K (12%)
- Caribbean (31%); North America (29%); SSA (18%); Europe (16%)



A-T MARKET DRIVERS — MOTIVATIONS TO TRAVEL

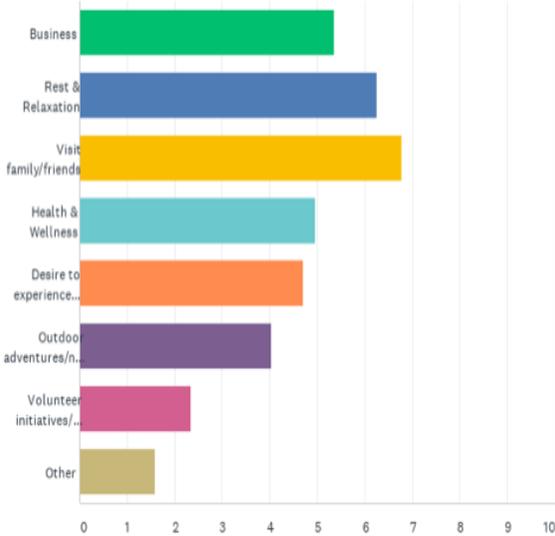
Pre-COVID-19

Q8 Which of the following factors motivated your decision to travel pre-COVID-19. Rank in order of priority, with 1 being most relevant, 8 being the least relevant.



Post-COVID-19

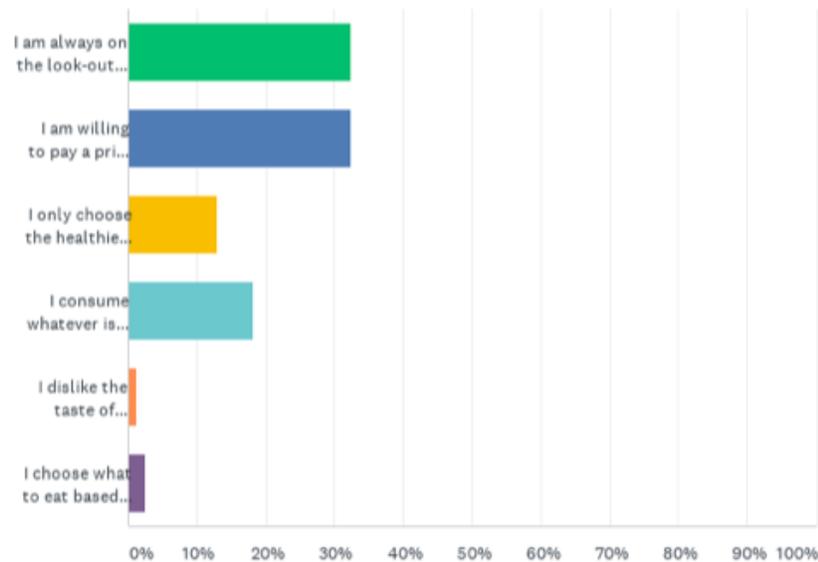
Q9 Which of the following will most likely be motivating factors for you to travel post-COVID-19. Rank in order of priority, with 1 being most relevant, 8 being the least relevant.



A-T MARKET DRIVERS — FOOD TRENDS

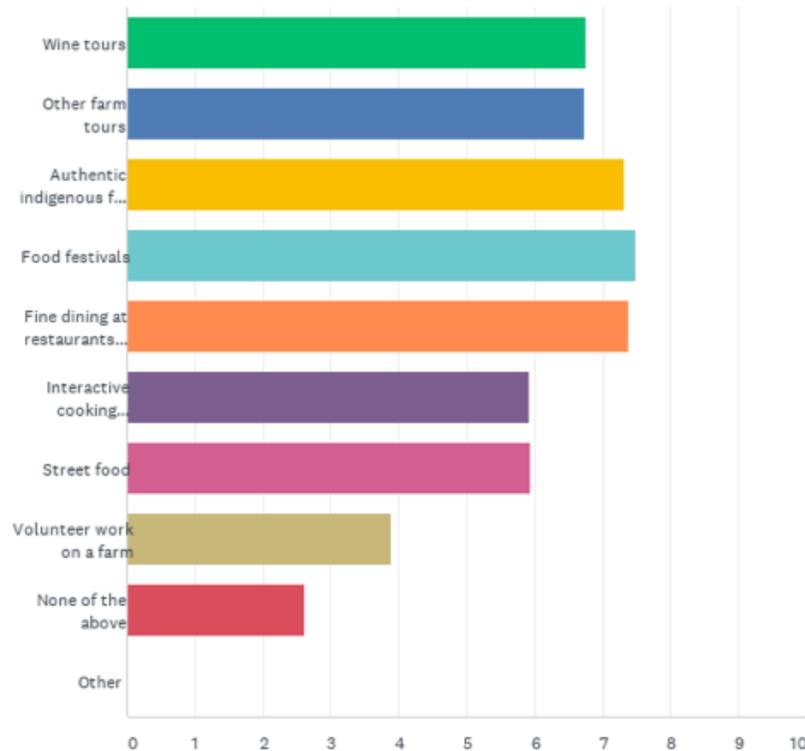
- **Health & Nutrition** ($\approx 66\%$ always search for healthier food options and willing to pay a price premium for tasty, nutritious food)
- **Convenience** ($\approx 18\%$ eat what is conveniently available)
- **Affordability** ($\approx 13\%$ make choice based on budget)

Q12 Which statement most represents your views on food and drink, during your travel?



A-T MARKET DRIVERS — FOOD TRENDS

Q10 During your travels, which of the following agricultural/culinary activities have in the past or might in the future interest you the most? Rank from 1-8, with 1 being your most preferred, 8 being the least preferred.



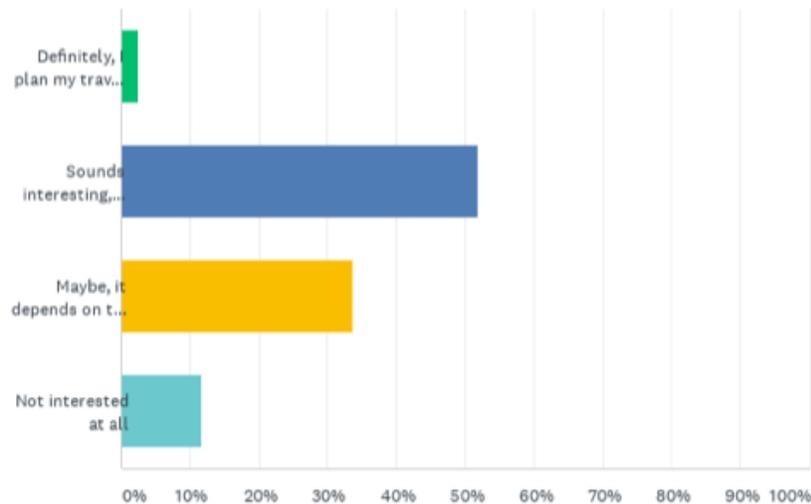
On a scale of 1-8, travelers indicate preference for:

1. Food festivals (≈ 7.5)
2. Fine dining at restaurants serving local cuisine (≈ 7.4)
3. Authentic indigenous food tours (≈ 7.3)
4. Wine tours (≈ 6.8)
5. Other farm tours (≈ 6.7)
6. Street food (≈ 6.0)
7. Interactive cooking classes (≈ 5.9)



A-T MARKET DRIVERS - ACCOMODATION

Q11 During your travels, how interested would you be in staying on a farm instead of a traditional hotel?

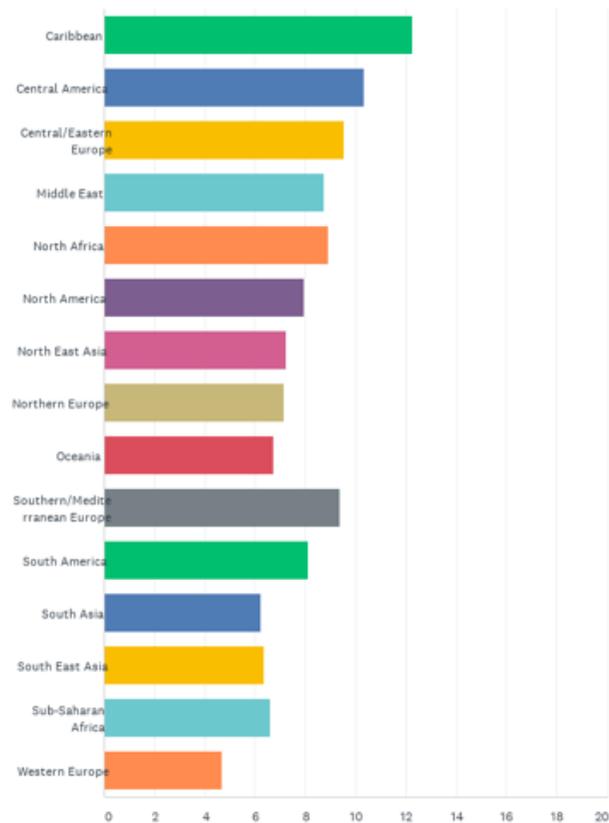


Travelers' willingness to use farm-stay accommodation instead of traditional hotel

- $\approx 52\%$ finds farm stays interesting and open to trying it
- $\approx 34\%$ open to trying, depending on the farm facilities
- $\approx 11\%$ not interested at all
- $\approx 3\%$ plan their travel around farm stays



Q13 To which of the following regions would you be interested in travelling to experience its agricultural and culinary tourism offerings? Rank the top six (6) in order of preference, with 1 being the most preferred, 6 being the least preferred.



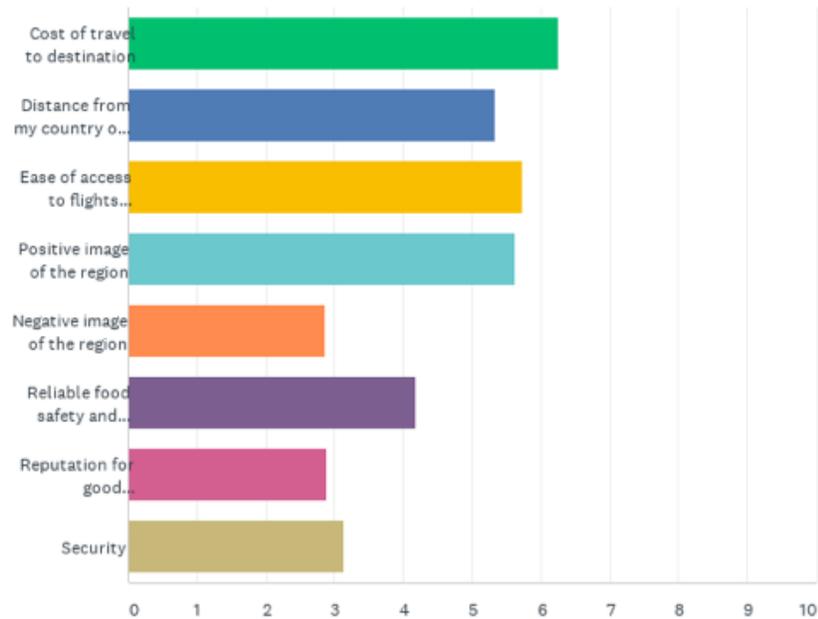
A-T MARKET DRIVERS — DESTINATION TRENDS

Among 15 regions (based on the World Tourism Organisation's regional groupings), the top 6 destination of choice

1. Caribbean
 2. Central America
 3. Central/Eastern Europe
 4. Southern/Mediterranean Europe
 5. North Africa
 6. Middle East
- **Sub-Saharan Africa was ranked 12th**



Q14 Which factor most influenced your response to question 13? Rank from 1-8, with 1 being the strongest influencing factor, 8 being the least important factor to selecting the region you visit.



A-T MARKET DRIVERS — DESTINATION TRENDS

Top factors influencing destination choice

1. Cost of travel to destination
2. Ease of access to flights
3. Positive image of the region
4. Distance from country of residence
5. Reliable food safety & hygiene systems enforced





**RELEVANCE OF
AGRITOURISM TO
FOOD SYSTEMS?**

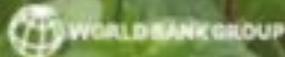
- **Food Systems (FS) are discussed in terms of how food is produced, accessed, and consumed**
- **At each stage, the FS faces challenges at the social, economic, & environmental levels**
- **Investments in A-T contributes to FS dev't at each stage & all 3 levels**

FUTURE of FOOD

Shaping the Food System to
Deliver Jobs



Foreword by Dr. Jins Yong Kim



RELEVANCE OF AGRITOURISM TO SOUTH AFRICA'S FOOD SYSTEM

“The food system determines who gets to eat and who doesn't; who can make a living from farming and who does not. It determines the income of farm workers, the price, the quality, the source of food on your shelves.”

An Empty Plate. Why we are losing the battle for our food system, why it matters , and how we can win it back.

Dr. Tracy Ledger, South African Author



RELEVANCE OF AGRITOURISM TO SOUTH AFRICA'S FOOD SYSTEMS

Main impact of broken FS in South Africa

- Highly dependent on food imports
- Food industry concentrated in the hands of the elite few
- Limited access to affordable nutritious food
- High rates of malnutrition among children
- About a $\frac{1}{4}$ (14 million) of population are hungry, particularly in rural areas

Agritourism's potential contributions/solutions

- Increase local production of diverse & nutritious food
- Brings markets closer to farmers
- Influence policies and marketing/messaging on food safety and nutrition
- Promote innovative SMEs
- Promote local economic dev't & rural development (A stronger local & rural economy increases food security both in terms of availability & affordability)



RELEVANCE OF AGRITOURISM TO SOUTH AFRICA'S FOOD SYSTEMS – SOUTH AFRICAN ENTREPRENEURS' PERCEPTIONS

Acknowledges the benefits of A-T

- **92%** agree/strongly agree it stimulates local economic activity
- **92%** agree/strongly agree it supports South African products & services
- **82%** agree/strongly agree there are economic benefits in marketing an A-T route collectively
- **50%** agree/strongly agree it increases revenues; **50%** don't know

But faces several challenges

- **80%** agree/strongly agree marketing A-T offerings is a challenge
- **80%** ranked cost of finance as most challenging
- **78%** agree/strongly agree that training & upskilling are needed for more success in A-T
- **64%** agree/strongly agree that Gov't resources for A-T are inaccessible
- **54%** agree/strongly agree that A-T needs more coordination; **46%** don't know



RELEVANCE OF AGRITOURISM TO SOUTH AFRICA'S FOOD SYSTEM



The dialogue will generate discussions on:

- Good practices and lessons from on-going A-T operations
- Roles of key stakeholders, including chefs
- Critical success factors, including innovation, education, access to finance and land, and efficient coordination
- Proposals for policy & program support & investments





MAIN REFERENCES

- Agritourism Survey – Global Traveler Perception; AgriLuxe Marketing, 2021
- Agritourism Routes: Shaping Sustainability; Western Cape Department of Agriculture & Worldwide Fund for Nature, South Africa; 2019
- Global Wellness Institute
- World Travel and Tourism Council
- World Tourism Organisation
- World Health Organisation
- Photo Credit: Creative Commons

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