Agri-Tourism Conference 2018

In celebration of

GALWAY, WEST OF IRELAND 2018
EUROPEAN REGION OF GASTRONOMY

In association with

ceagasc

Failte Ireland
Farm holidays in Austria

Presentation at the Irish Agri-Tourism Conference 2018
Ballinasloe, Galway, October 15, 2018.

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7 Pre-conditions for a successful development of agrotourism (after Bernard Lane/University of Bristol/GB)

- Attractive landscape and rich cultural heritage
- Easy accessibility from the (mainly rural) markets of origin
- Small and medium farms with interest in diversification
- Farms owned by the farmers
- Farms in relatively wealthy regions i.e. farmhouses are well equipped; room for accommodating visitors available
- Local/regional tourism organisations for marketing and infrastructure
- Hospitality resp. tradition in hosting guests
Farm Holidays in Austria - Economic scale
(source: Statistik Austria, agricultural statistics 2010)

- Austria: 9,900 farm holidays enterprises
- 114,000 tourist beds in rooms and/or appartements
- A: 1/9 of total Austrian tourist bed-supply is on farms
- Daily expenditure of farm holiday-visitors in the rural space: app. 1,000 – 1,200 Mio € per annum
- This expenditure creates / secures 23,000 jobs in rural areas
Farm Holidays in Austria –
regional distribution:

Regions with intensive agriculture – few holiday farms

Mountaineous Regions – high proportion of holiday farms
Teilnahme der Land- und Forstwirtschaft an der Tourismuswirtschaft

nach NUTS III Regionen, Agrarstrukturerhebung 2010

Anteil der Urlaub am Bauernhofbetrieb an den Land- und Forstwirtschaftsbetrieben 2010

- < 5,0
- < 10.0
- < 15.0
- < 20.0
- >= 20.0

Anteil der Fremdenbetten auf Urlaub am Bauernhofbetrieb an den Fremdenbetten insgesamt, 2010

max. 166.620 (Pinzgau-Foncagau)

- Betten LFW
- Betten sonstige

Grenze NUTS III

Grenze Bundesland
Farm holidays Association

- 2,300 members
- 27,500 tourist beds
- 41% repeat business
- Ø business size = 12.6 guest beds
- Ø advertising expenditure per bed/year app. € 120,--
- Ø price per overnight stay for b&b € 37,00. Per appartement (4 persons) € 88,30
- Load-factor: summer-season 66 days/bed/season
  winter: 50 days/bed/season
- Income: Ø 34% of farm income from HoF
Elements of a successful agritourism strategy (example Austria, 3 strategies: 1990, 2000, 2010)

- Organisation and cooperation
- Training, consultancy and information
- Branding
- Quality
- Theming, special interest
- Marketing
Who worked on the strategy?

- Farmers, landlords
- Chamber of agriculture (consultants, experts)
- Farm holidays (organisation) employees
- Tourism experts (eg. from Austrian Nat. Tourism Organisat.)
- Tourism consultants
- Ministry of agriculture representatives
task: marketing
target: visitor

Organization & Partners

task: development and training
target: providers

Austrian National Tourist Office

9 provincial tourism organization

town and regional tourism organization

Hotels, inns, room renters, B&B`s and others

Holidays on the Farm

8 prov. asso. Holidays on the farm

town and regional pools of renters

2,300 Holiday Farms

Austrian Chamber of Agriculture / ministry

8 Provincial Chambers of agriculture

regional chambers of agriculture

(all) farms
Quality categorization

Attractive products for specific target groups

Using common strengths

Promotion channel

New markets accessible

VISION

= imagination of a positive future development

↓
product

↓
price

↓
distribution place

↓
promotion
Realization of the task „Farm Holidays 2020“ in 4 new projects (from 2015)

- **Project 1:** Dynamic quality assurance in hardware and service
- **Project 2:** Acquisition of new customers for the farming world and sustainable customer loyalty
- **Project 3:** Internet and Social Media
- **Project 4:** Farm Holidays products 2020 (Development of the generic product)
Strengths of HoF farm on the tourism market

- Small, personal enterprises
- Meeting local people
- Farming experience (first hand)
- Farming produce directly from the farmer
- Ecological (tourism) product
Challenges / problems in development of HoF

- Small (micro) enterprises, owners less professional
- (very) limited budgets eg. for marketing
- Limited marketing orientation
- Time restrictions (work on farm, family, guests, …)
- Enterprises too small for professional tools (eg backoffice etc.)
- Legal restrictions (growth, product, cooperation etc.)
countries of origin
basis: category „private + appartements on farm“, bednights
**Dominant Sinus Milieus 2015**
**Target Group Families with children** *(Basis: Farm Holidays-Enquiries)*

1. **Oberschicht/Obere Mittelschicht**
   - Sinus A12 Konservative 106
   - Sinus B1 Etablierte 145

2. **Mittlere Mittelschicht**
   - Sinus AA Ländliche 90
   - Sinus A23 Traditionellen 81
   - Sinus B2 Bürgerliche Mitte 104
   - Sinus B12 Postmaterielle 117
   - Sinus C12 Moderne Performer 113
   - Sinus C2 Experimentalisten 86

3. **Untere Mittelschicht / Unterschicht**
   - Sinus BC3 Hedonisten 62
   - Sinus B3 Konsumorientierte Basis 75

**Soziale Lage**
- A: Traditionelle Werte
- Pflichterfüllung, Ordnung
- B: Modernisierung I
- Individualisierung, Genuss, Selbstverwirklichung
- C: Modernisierung II
- Experimentierfreude

© Sinus Sociovision
Branding – example Germany
Branding – example Austria
Quality classification

• Classification since 1993
• 1993-96: emphasis on facilities (hardware)
• 1997-2000: emphasis on services (software)
• 2001- : equal emphasis on three areas
  * farm quality
  * facilities quality
  * service quality
Special-interest – products

- families with children
- handicapped people
- seminars
- handicraft
- wine
- organic farms / health
- horse riding

2 flowers
3 flowers
4 flowers
BABY- UND KINDERBAUERNHÖFE IN ÖSTERREICH
Zimmer und Ferienwohnungen
2018/2019

BARRIEREFREIE BAUERNHÖFE IN ÖSTERREICH
Zimmer- und Ferienangebote
2018/2019

BIO- UND VITALBAUERNHÖFE IN ÖSTERREICH
Zimmer- und Ferienwohnungen
2017/2018

REITERBAUERNHÖFE IN ÖSTERREICH
Zimmer und Ferienwohnungen
2018/2019

ALMHÜTTEN IN ÖSTERREICH
2018/2019

WINZERHÖFE
STEIERMARK / BURGENLAND / NIEDERÖSTERREICH
Zimmer und Ferienwohnungen
2017/2018
Cooperation with Austrian NTO

Schaltplan Printanzeige:

Süddeutsche Zeitung Magazin / 5.6.2009
Welt am Sonntag Icon / 29.3.2009
Welt am Sonntag Icon / 26.7.2009
Zeit-Magazin LEBEN / 6.8.2009
Handelsblatt / 15.5.2009

Reichweite: ca. 32 Millionen Leser
Austria - Cooperation with Heumilch

Startseite www.heumilch.at
Cooperation with direct sellers from the farm

Cooperation Holidays on the farm with „Quality from the farm“

Mutual links on enterprise-level
-> Added value for visitors
-> Synergies for members

Ca. 2.300 HoF-Enterprises
Ca. 1.670 QfF-Enterprises

From QfF to HoF: 524 Klicks on HoF-Enterprises
From HoF to QfF: 8.543 Klicks on QfF-Enterprises
Holidays on the farm:
- 2,300 enterprises (incl. Pasture huts/chalets)
- Map- / Listing-View
- Detail-View
- Buchung-Functionality
  - On request (E-Mail-Form)
  - Online-Booking
- BIO-Filter (Organic farm)
- HoF-Top-Search-Words
- Navi-Search
- Calling-, E-Mail-, Homepage- and Facebook-Function
Schmankerl-Navi: Map-, List-, Detail-View

Map-View

Listing-View

Detail-View of enterprise with booking & request-button
Schmankerl-Navi: Details Farm & Booking-Level/Functionality

Picture of farm (1 main p.)

Detail-View

Booking-Functionality

Zimmerart
- Ferienwohnung

Unterkunftsart
- Urlaub am Bauernhof

Verpflegung
- ohne Verpflegung

Hofprodukte
Freuen Sie sich auf einen Schlick selbstzerzeugten Most frisch vom Fass oder Apfelsaft direkt bei uns am Bauernhof!
All channels/platforms have to be serviced individually

-> (often too) much work for the provider
-> Danger of double-booking!!!
Data-servicing via the „farm holidays data-cockpit“

- Considerably less work for the provider
- Data-input only ONCE (for online-booking)
- Automatic data-exchange with channels
- NO DOUBLE BOOKINGS!

Farm Holidays Data-Input („cockpit“)
(Technology: Kognitiv)
Actual figures

Development visits on platform

Besuche auf der UaB-Plattform 2003 - 2017 (BV + LV)
(Quelle: bis 2008 H8X, ab 2009 Google Analytics)
Development Online-Booking-Turnover via Holidays on the Farm Channel Management

Entwicklung UaB Gesamt-Online-Buchungsumsatz in €
Zeitraum: 2003-2017
(Quelle: Tiscover und UaB)
Online bookings on farms – countries of origin (2017)

In 2017 **bookings from 96 different nations!**
Farm Holidays in Austria

<table>
<thead>
<tr>
<th>Year</th>
<th>Price in €</th>
<th>Occupancy rate (bednights)</th>
<th>Turnover/bed in €</th>
</tr>
</thead>
<tbody>
<tr>
<td>1991</td>
<td>13,10</td>
<td>37,0</td>
<td>4144</td>
</tr>
<tr>
<td>2007</td>
<td>22,90</td>
<td>90</td>
<td>2335,8</td>
</tr>
<tr>
<td>2017</td>
<td>37,0</td>
<td>102</td>
<td>1179</td>
</tr>
</tbody>
</table>

Thank you for your attention!
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