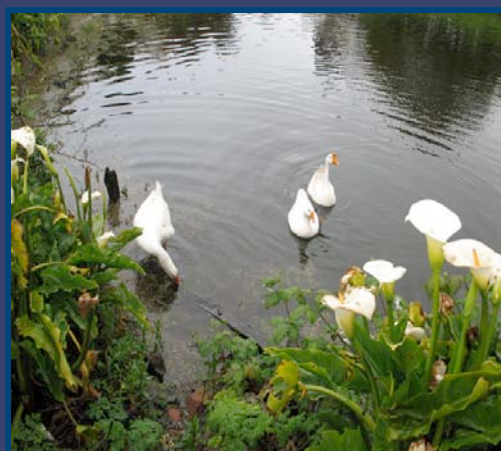




Survey of California Agritourism Operators



University of California
Cooperative Extension

UC Small Farm Program

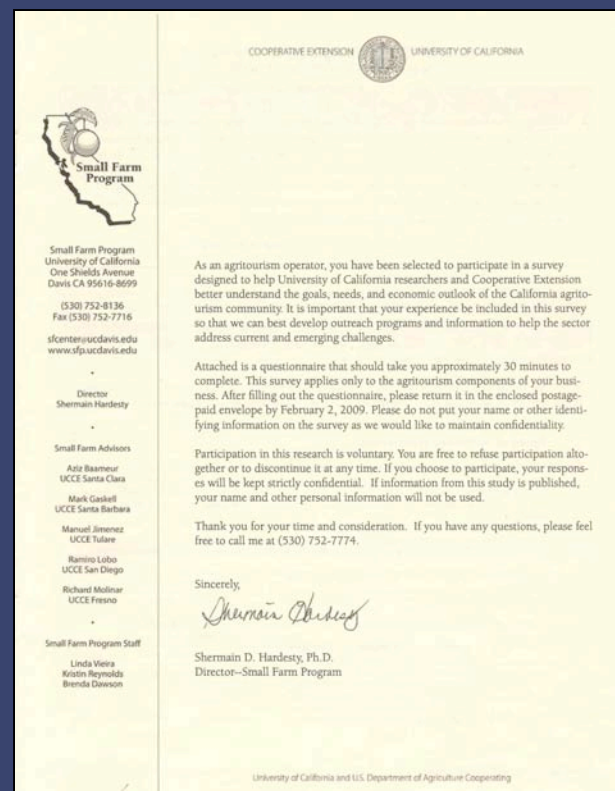
Holly George, Ellie Rilla, Penny Leff



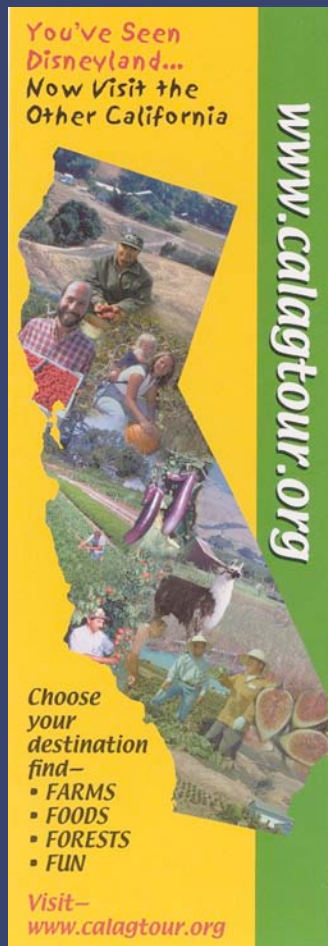
National Extension Tourism Conference
Park City, Utah -- June 2009

UC Survey Team

- Holly George, UCCE
- Christy Getz, UCB
- Ellie Rilla, UCCE
- Shermain Hardesty, Small Farm Center, UCD
- Kristin Reynolds, UCD
- Penny Leff, SFC



State Agritourism Workgroup Benchmarks



- 1997 Workshops around state start
- 2000 *Calagtour.org* website
- 2002 State Agritourism Handbook
- 2005 *Agritourism & Nature Tourism in California* book published, DANR
- 2007 White paper statewide focus
- 2009 UC Small Farm Center hires state Agtourism Coordinator

Survey Goals

- Better understand goals and needs of California agritourism operators
- Identify size and profitability of the California agritourism community
- Develop outreach programs and information to help sector
- Improve operator database



Defining the PRODUCT

Agritourism

“Any income-generating activity conducted on a working farm or ranch for the enjoyment and education of visitors.

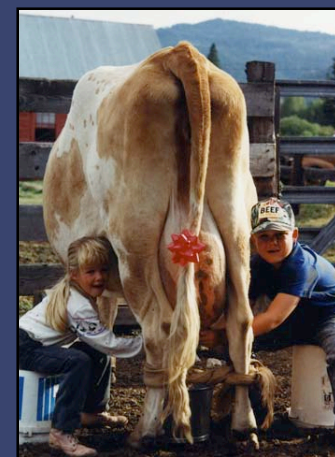
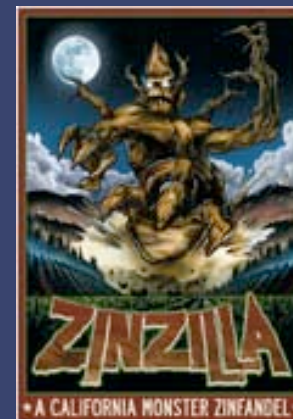
It includes the interpretation of the natural, cultural, historic, and environmental assets of the land and the people working on it.”



*Agritourism and Nature Tourism
in California (pg 3)*

Survey Focus

- Types of activities
- Marketing
- Managing
- Staffing
- Profitability
- Visitors



Survey Methods

- Mixed mail list
- 1,940 surveys mailed
- Mailed February 2009
- Winery issue
- 222 respondents not involved in agritourism



● **N = 332**

Responses by Region



UC Small Farm Center

California Farm Trail Links

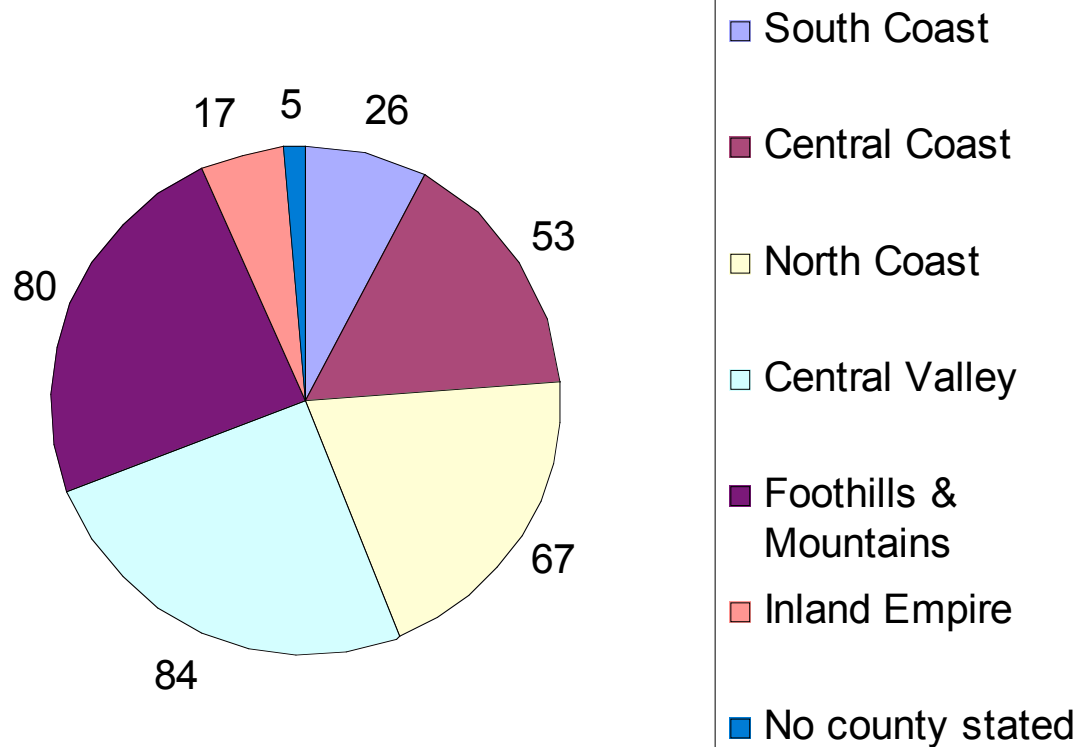


California Agri-tourism Database

Welcome to the UC Small Farm Center's California Agri-tourism Database. We provide this agri-tourism information solely as a convenience to you, and not as an endorsement of these agri-tourism operations.

Roll over map to select county, or [click here to search using database](#)-->

Respondents by region



California Wine Industry

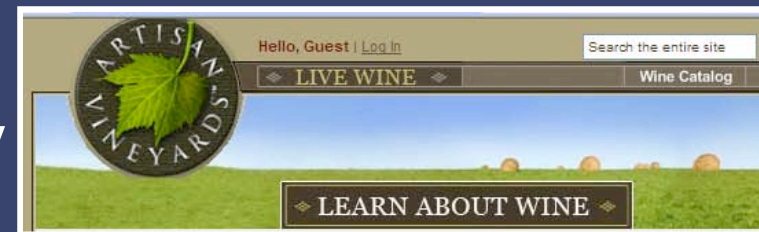
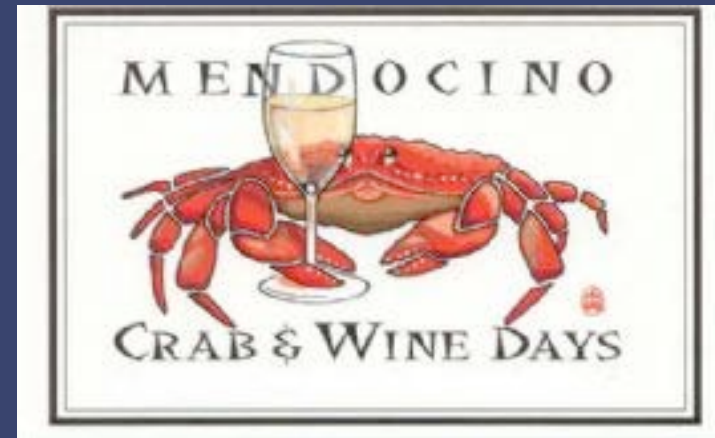
- 4th largest in world
 - 2.5 billion bottles/yr
 - 19.7 million winery visitors
 - \$2 billion in annual tourism expenditures in 2005
 - 2,687 wineries
 - 500,000 acres of vineyard
- 
- Annual impact of \$51.8 billion on CA economy
 - \$125.3 billion on the US economy annually

Source - 2005 Wine Institute Study

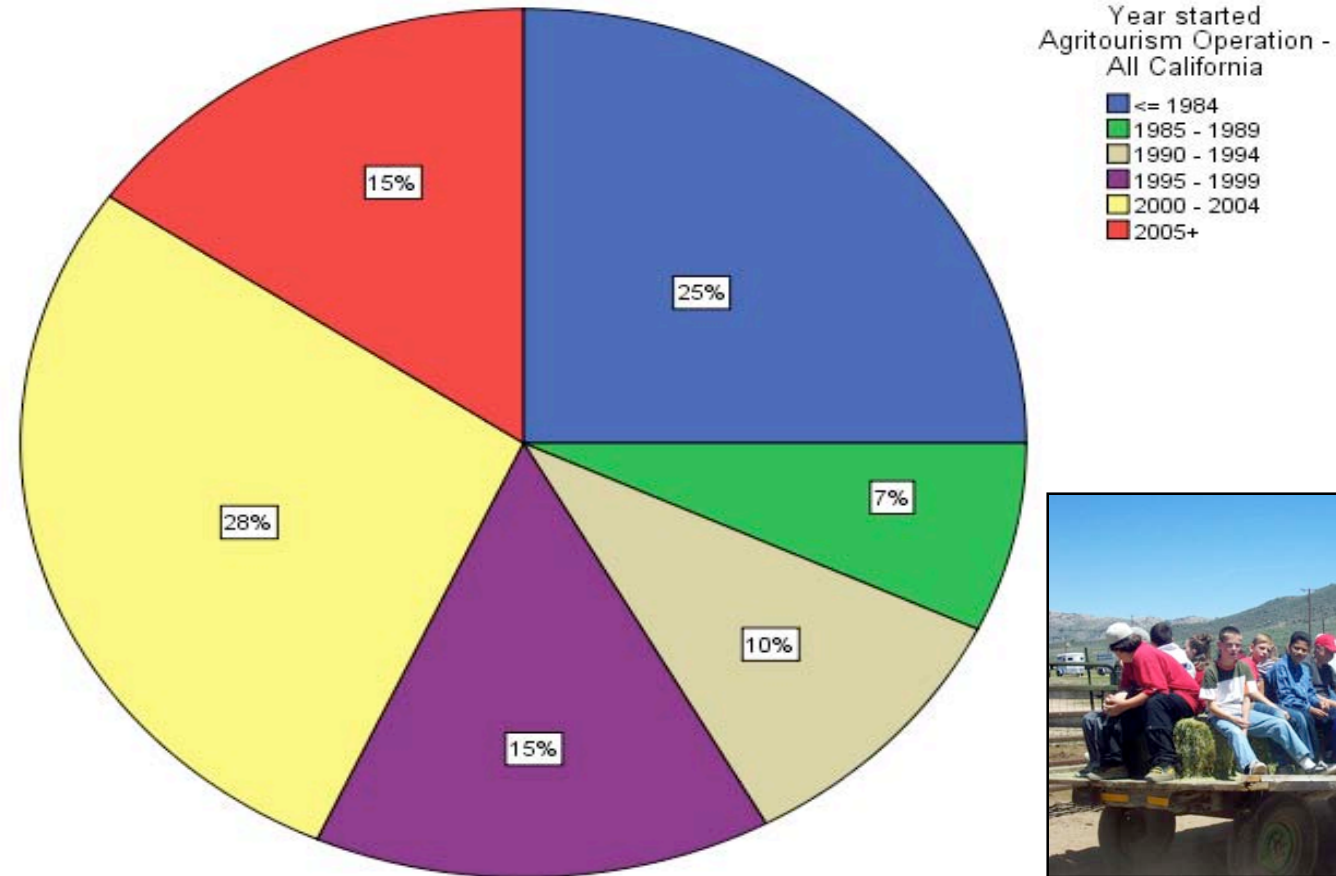
Godfather of Agritourism

Wineries are remarkably effective magnets for tourism.

America's new experiential consumer' is particularly attracted to the personal connection, artisan atmosphere, rural environment and beauty of California's wineries and vineyards."

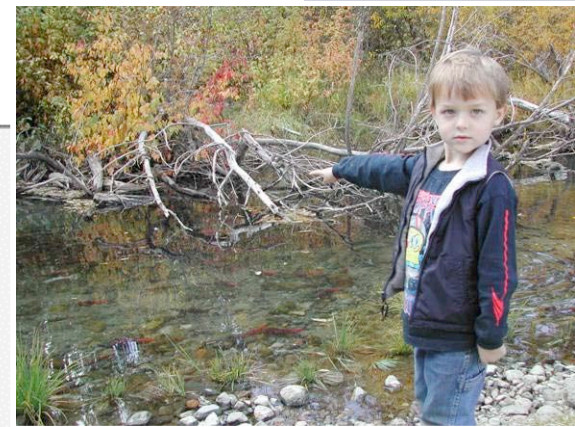
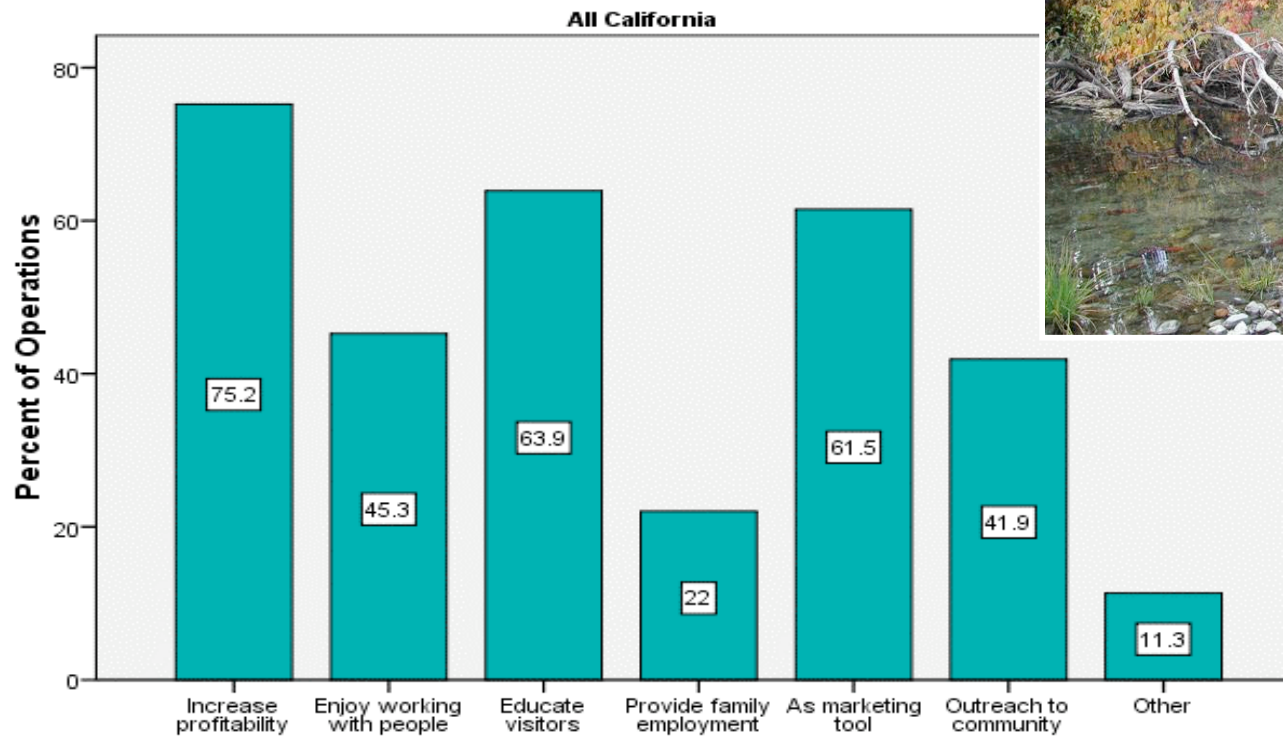


Year Started Agtourism



Motivators

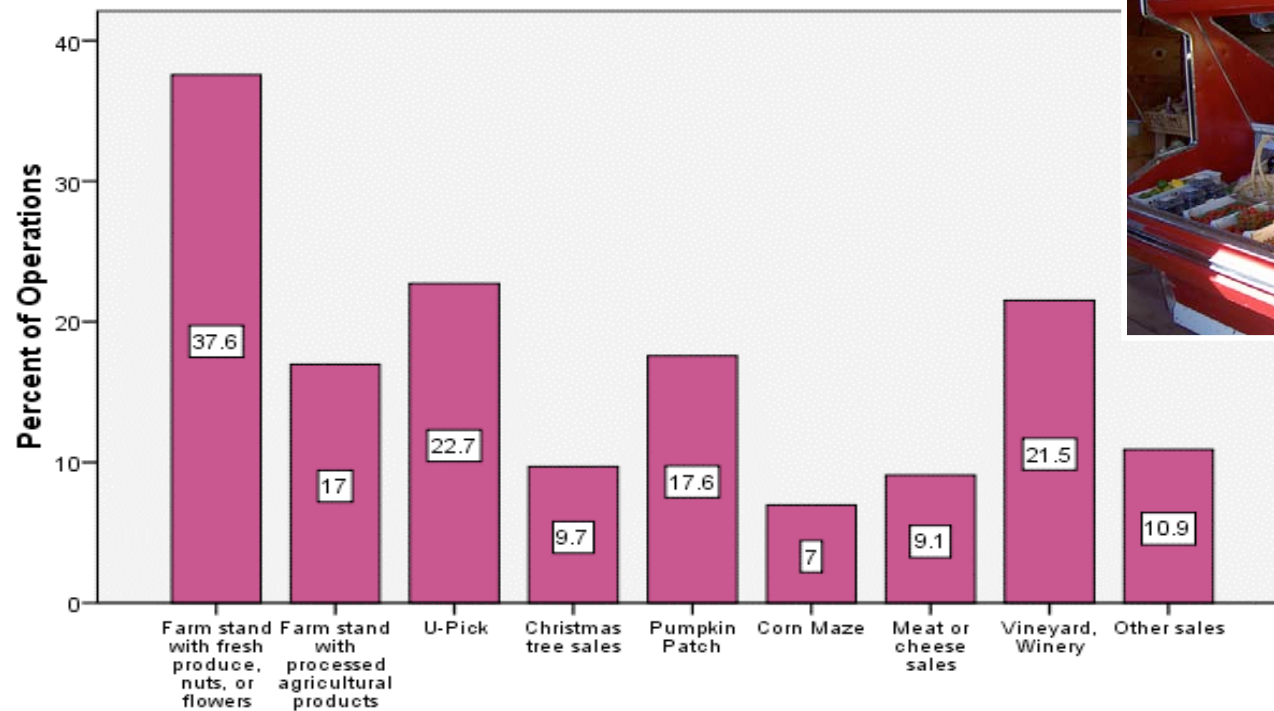
Why did you open your farm/ranch to visitors?



Activities and Sales

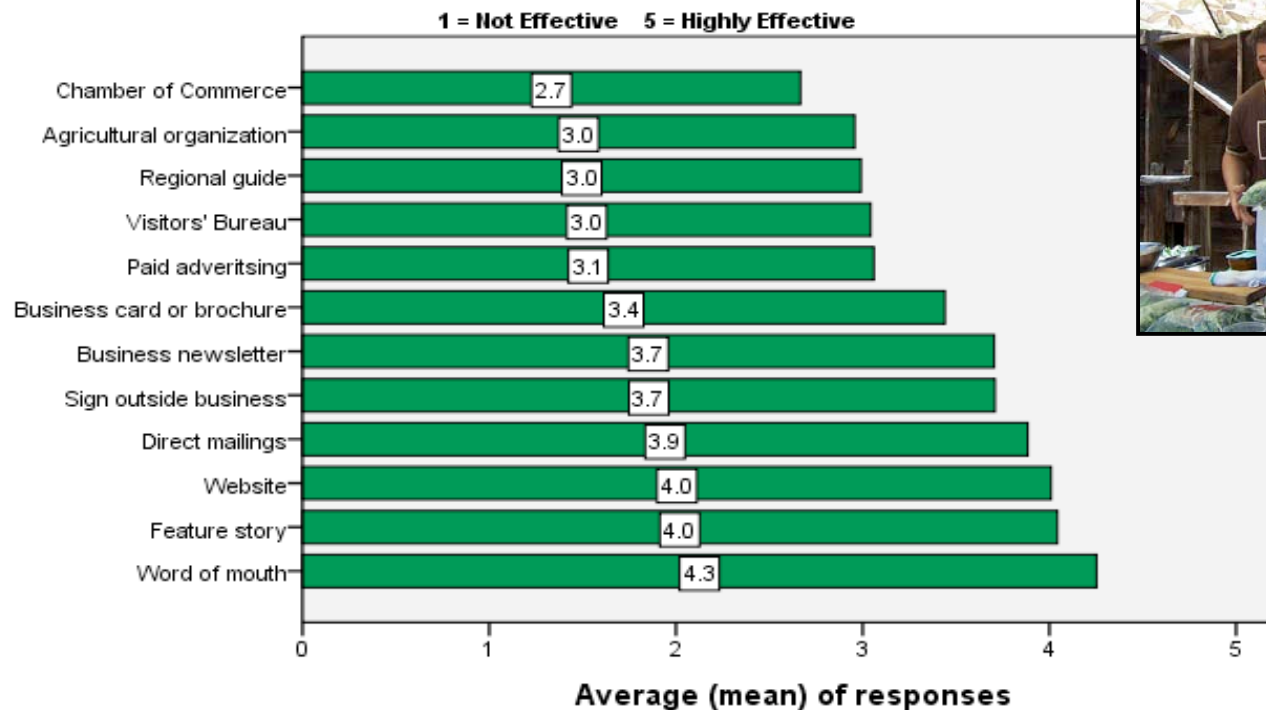
What direct sales are part of your agritourism operation?

All California

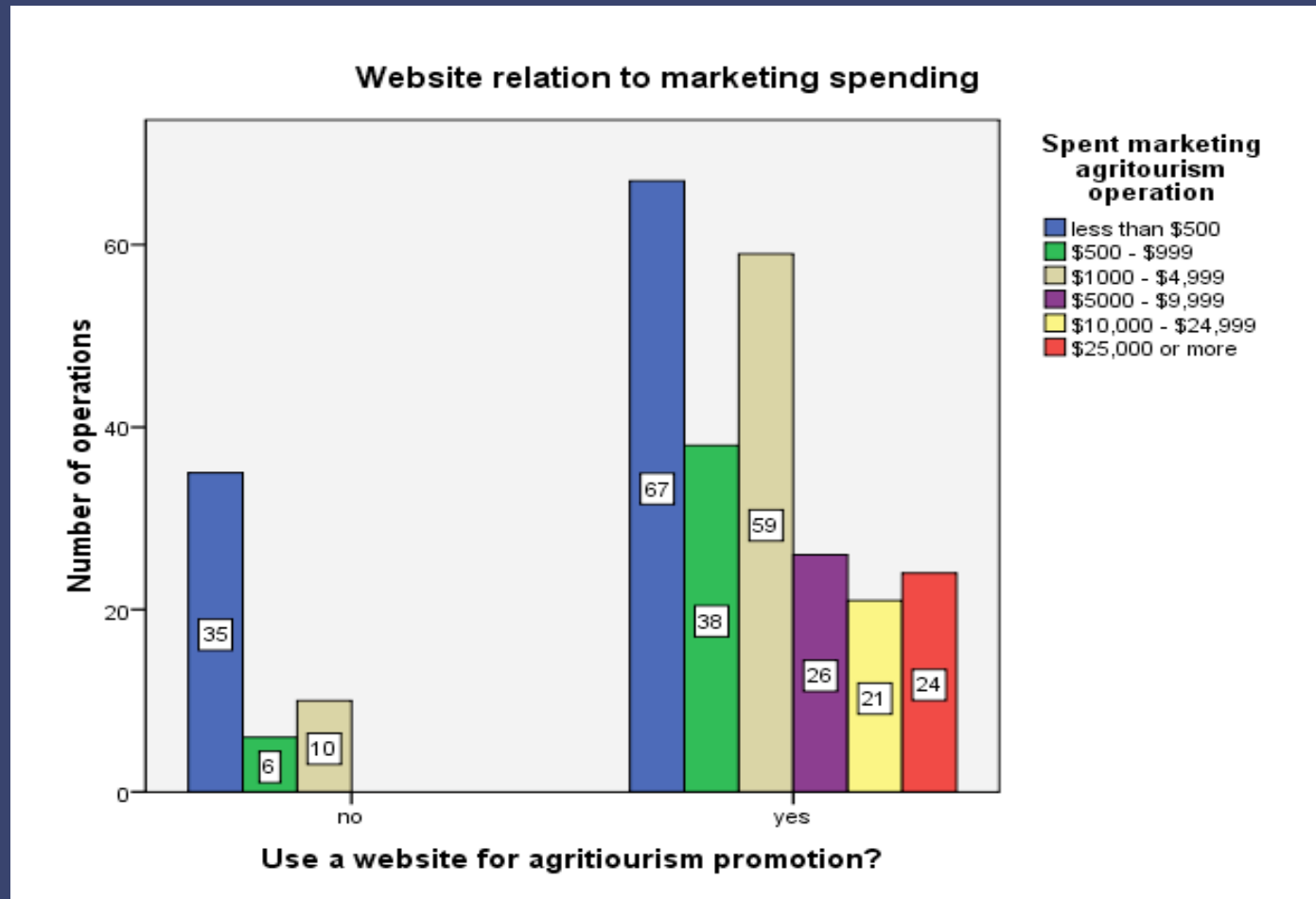


Marketing & Promotion

Rate the effectiveness of each type of promotion used



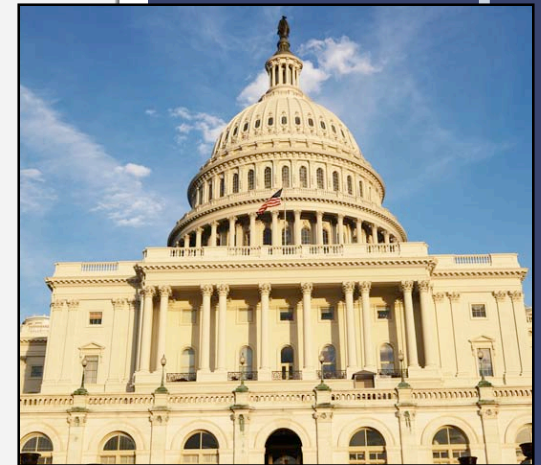
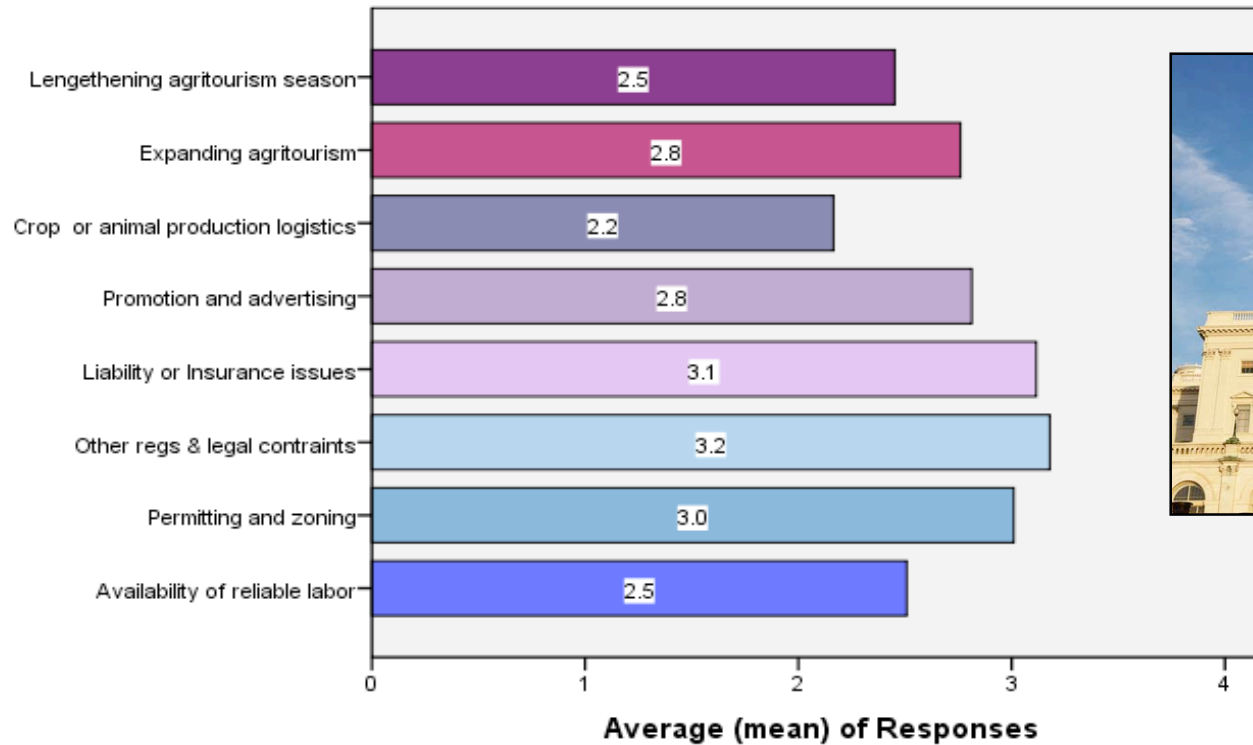
Marketing Expenses & Websites



Major Challenges

What are the Major Challenges for your Agritourism Operation?
1 = Not a Problem 5 = Very Challenging

All California



Comments on Challenges

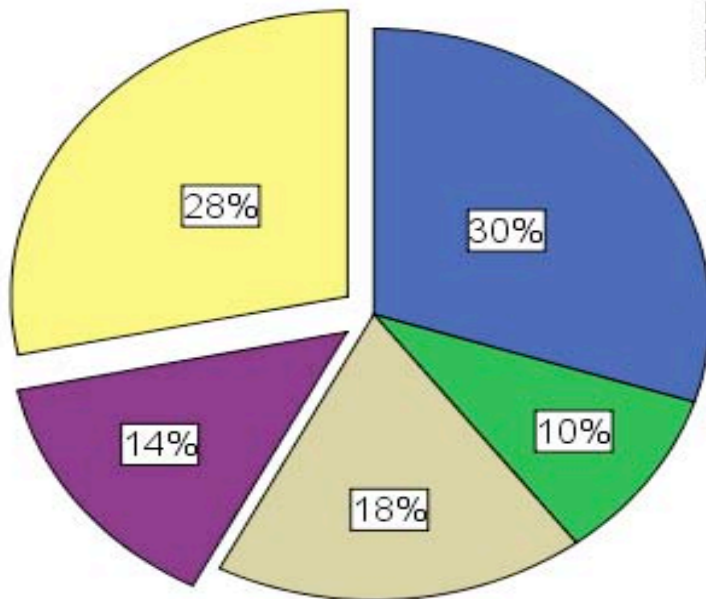
- Money, cash flow, profitability
- Government regulations, intervention, taxes, fees
- Environmental regulations
- Insurance & liability



Permitting and Zoning Issues

Permitting and zoning

- not a problem
- slightly challenging
- somewhat challenging
- challenging
- very challenging



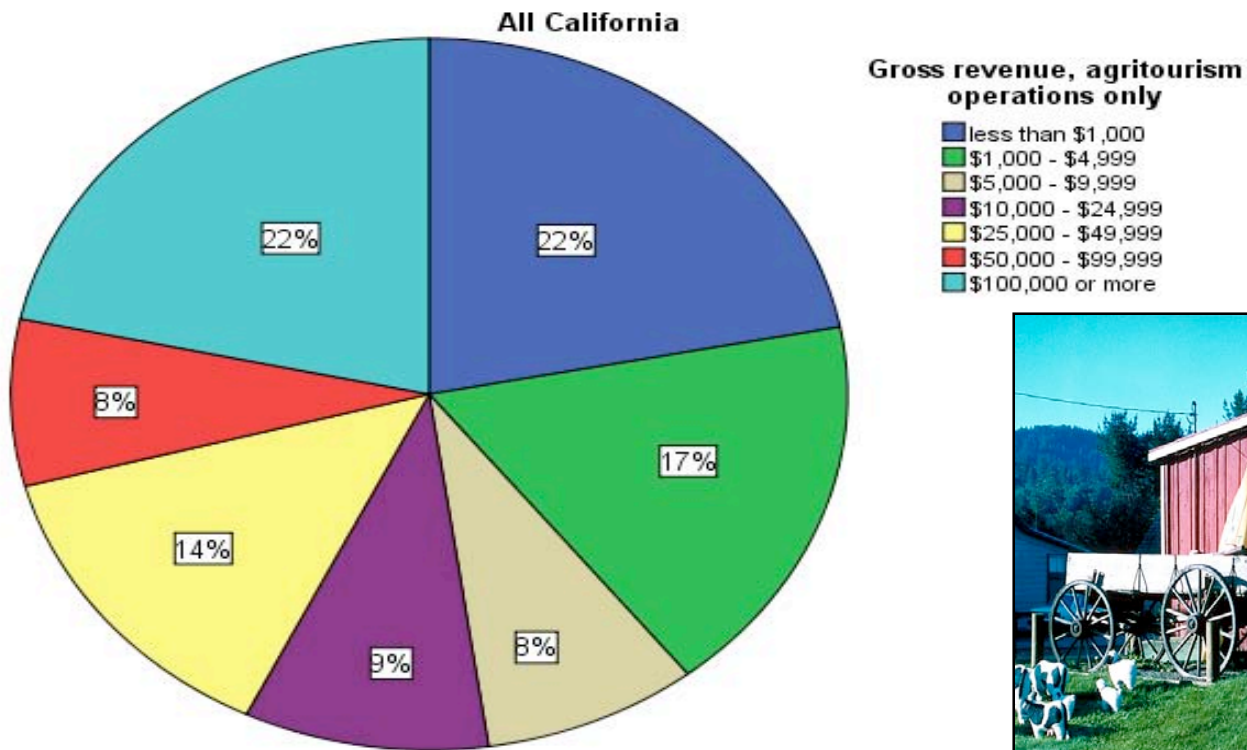
Business Plan and Insurance Coverage

- 87% have insurance
- 90% of insured have at least \$1 million or greater
- 24% have a business plan for the ranch
- Also have a business plan for agritourism venue



Agritourism Revenue

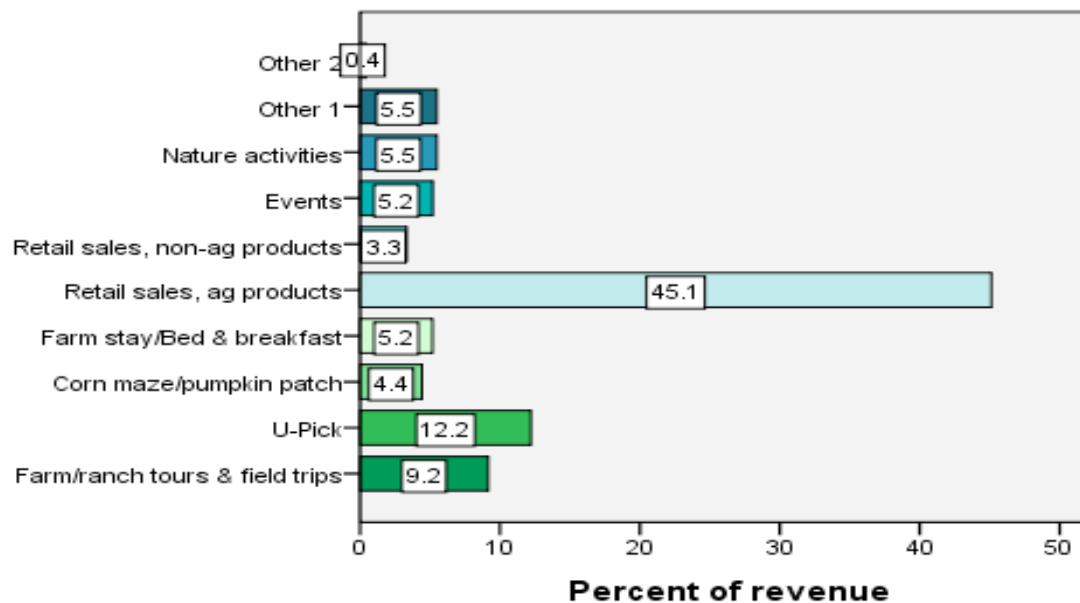
Gross Revenue, Agritourism Operations



Agritourism Revenue by Activity

Average percent of agritourism revenue by activity

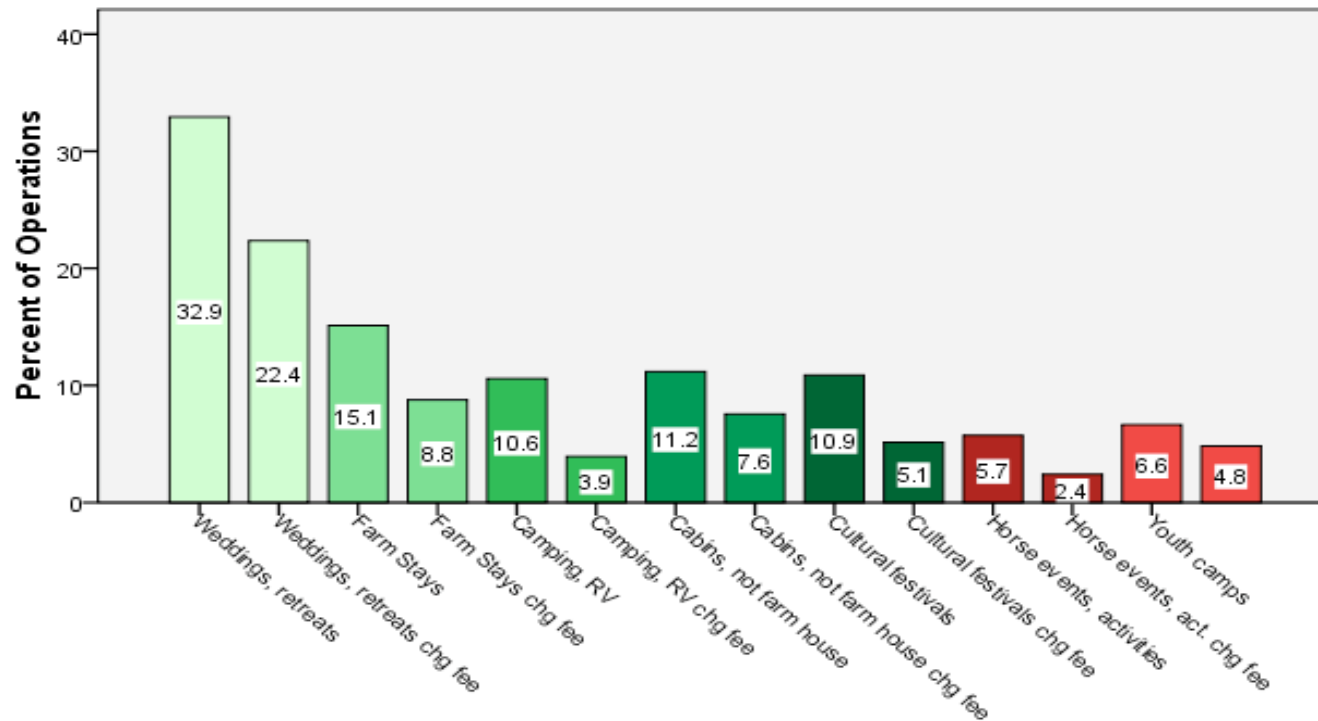
All California



Fees charged?

What facilities for people or special events do you offer?
Do you charge a fee?

All California

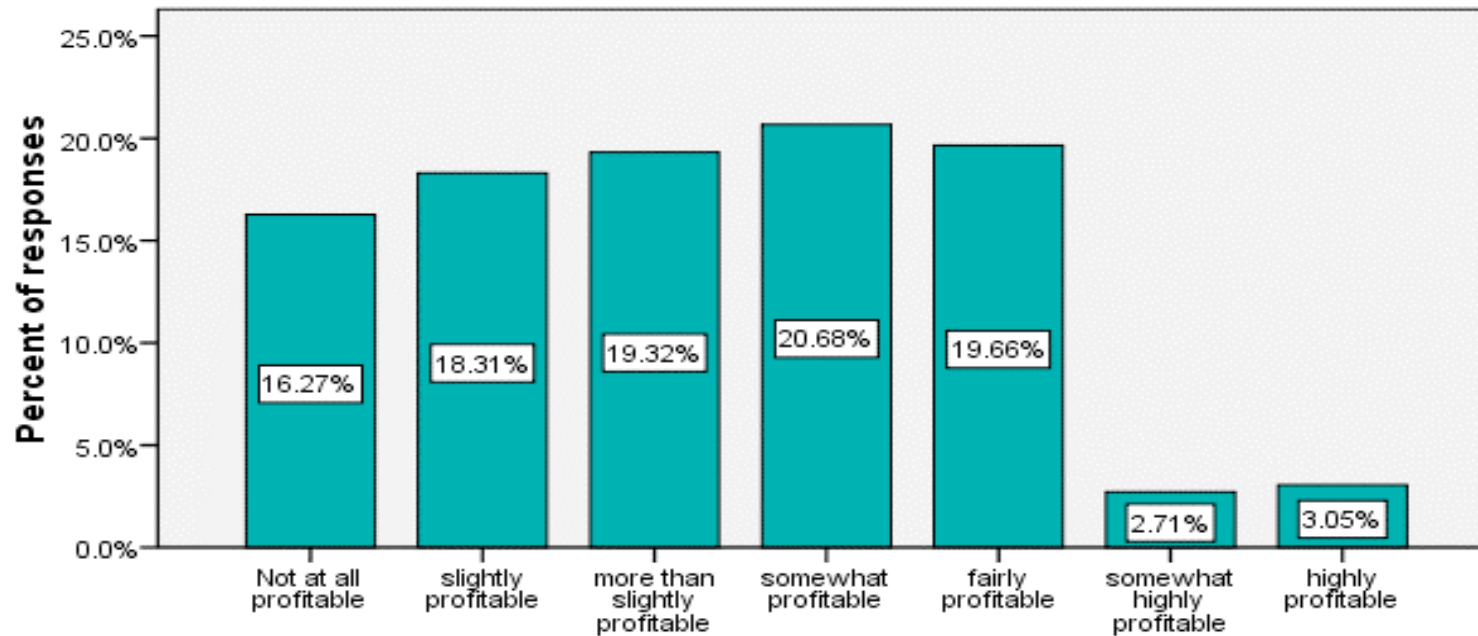


Profitability Range

Operators' Rating of Agritourism Operation Profitability

7 = Highly Profitable 1 = Not at all profitable

All California



How profitable is your agritourism operation?

Challenges of Estimating Gross Income

California Census of Agriculture Stats for *Agritourism*

- 2002 \$6.5 million 499 farms
- 2007 \$35 million 685 farms

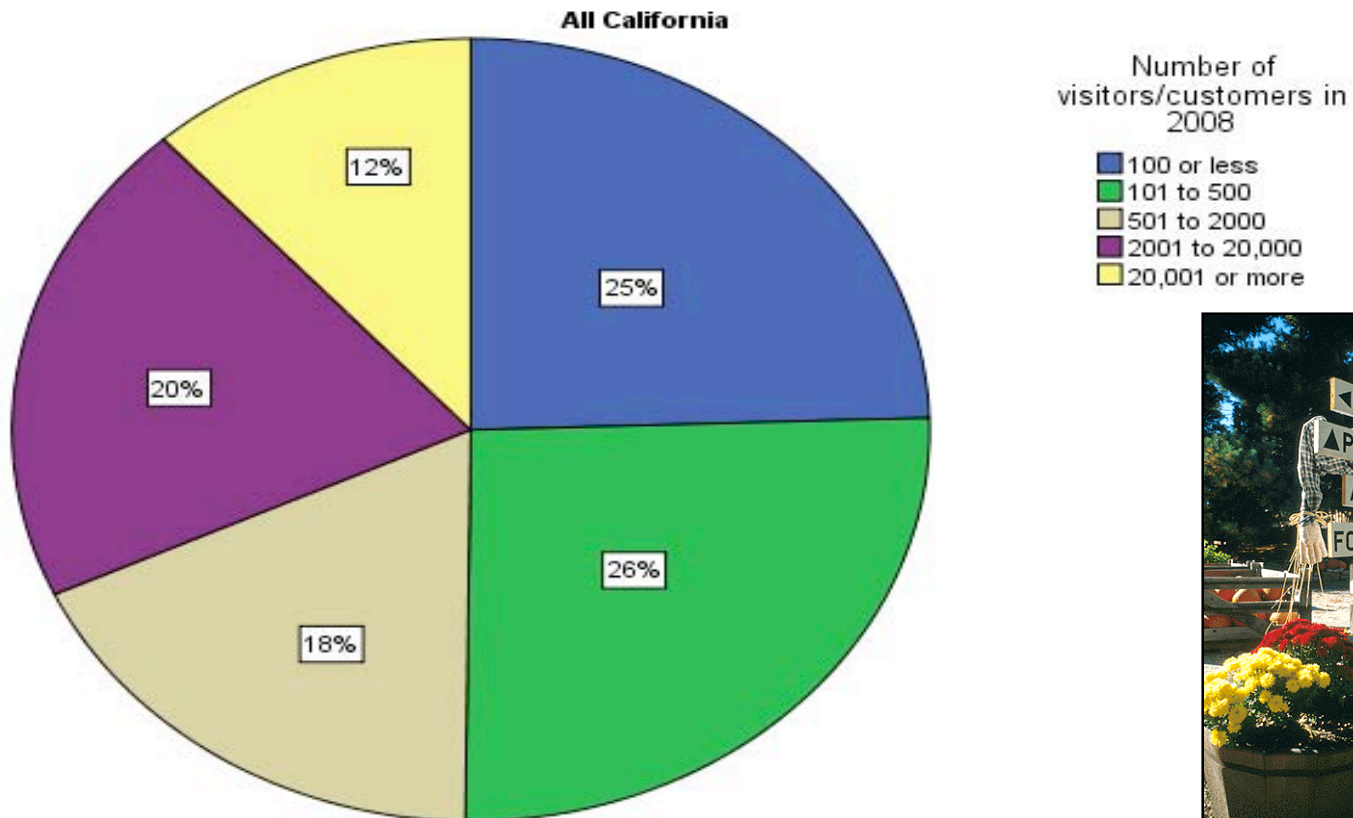


New York Stats:

- 1999 \$210 million in Kuehn study 645 farms
- 2007 \$17 million in Census of Ag 1,420 farms

2.4 Million Visitors in 2008

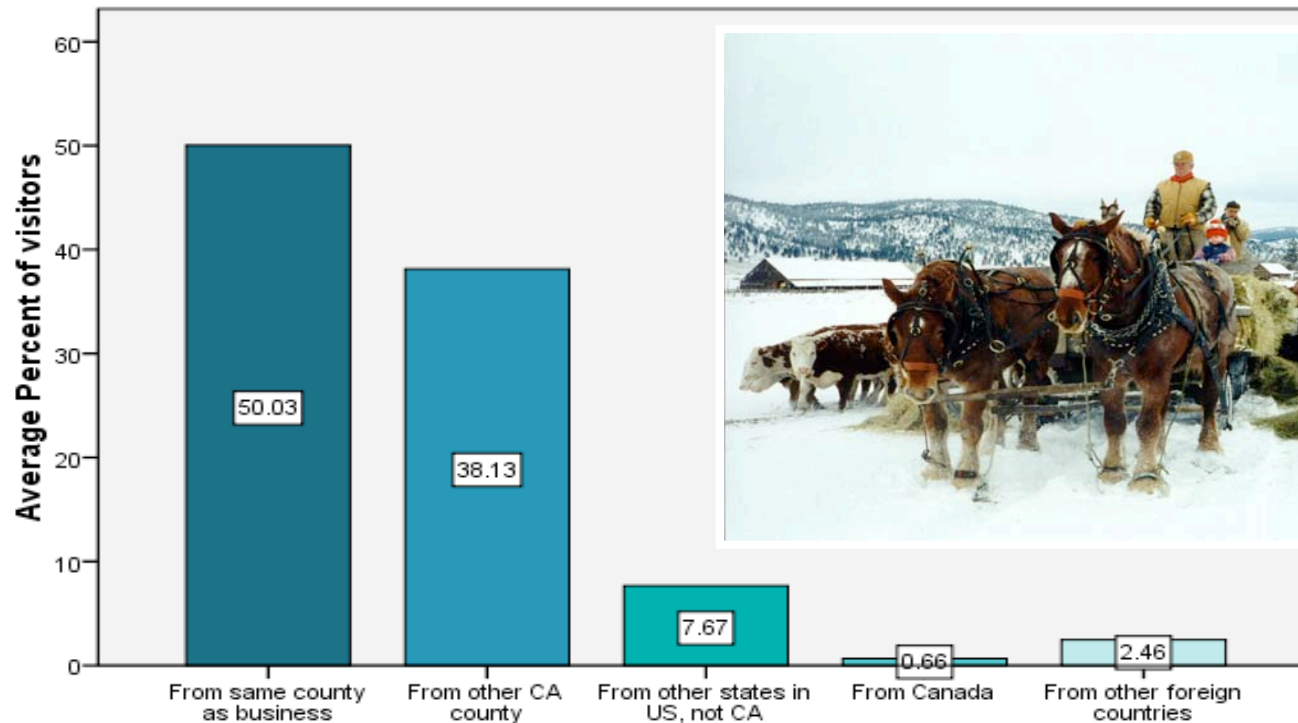
Number of Visitors/Customers to Agritourism Operation



Visitor Demographics

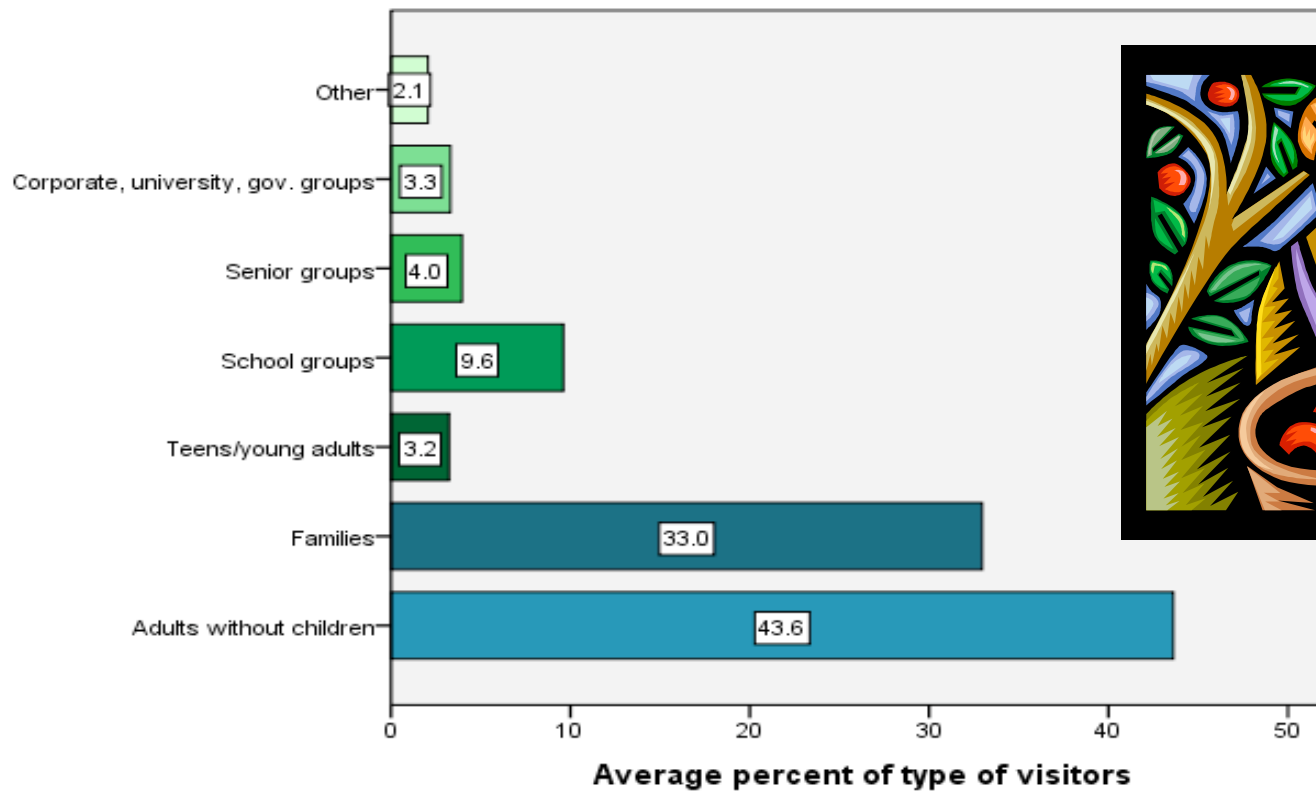
Average percent of visitors coming from where?

All California Agritourism Operations



Visitor Types

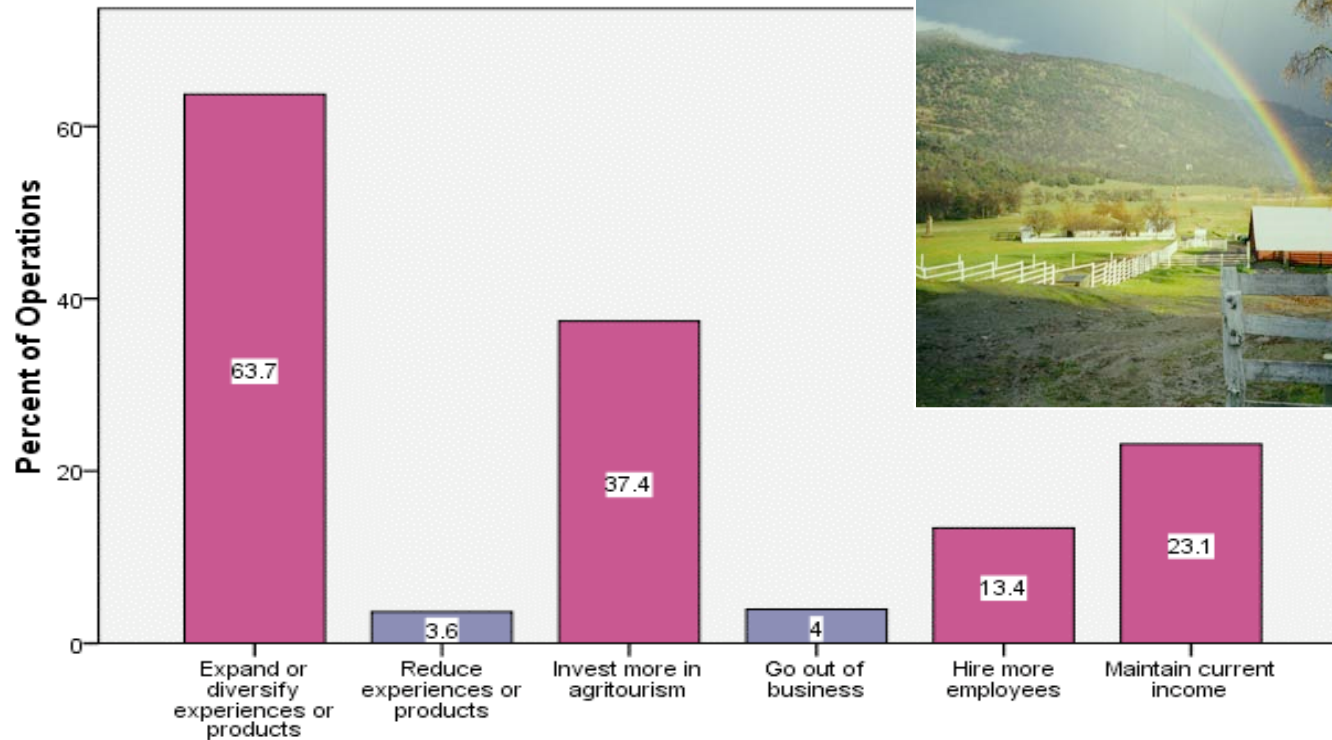
What types of visitors/customers in 2008?



Future Plans

What plans do you have for your agritourism operation over the next five years?

All California



Conclusions

- Initial analysis stage
- Correlate with wineries
- Share with operators, agencies, universities, tourism industry, local government
- Journal articles

