California Agritourism Snapshot 2017

Yolo/Solano/Sacramento Agritourism Summit – February 13, 2017

Penny Leff, Agritourism Coordinator
UC Small Farm Program
Agritourism is:

• Any income-generating activity conducted on a working farm or ranch for the enjoyment and education of visitors.
1. Multi-institutional interdisciplinary research group is surveying western agritourism operators as part of 3 year USDA grant: “Place-Based Innovation: An Integrated Look at Agritourism in the Western US”

2. Agritourism Producer Surveys conducted in both Colorado and California – completed June 2015

3. Also using data from project’s agri-tourist survey (all US), spatial data collection, and some producer case studies (2015 – 2016)
Agritourism in California

California Agritourism and Winery Operations

Agricultural tourism is a commercial enterprise at a working farm, ranch or agricultural plant conducted for the enjoyment or education of visitors, and that generates supplemental income for the owner.

Agritourism examples:
- farm stands or shops
- U-pick
- farm stays
- tours
- on-farm classes
- festivals
- pumpkin patches
- Christmas tree farms
- on-site weddings
- youth camps
- wine tasting
- hunting or fishing

Data collected and map produced May, 2015 by the UC Small Farm Program
Survey of Likely Agritourism Operators

• Conducted online and through US mail: February 2 – May 19, 2015

• 150 Colorado Producer Survey respondents total
  – 141 non-duplicated complete surveys
    • 71.6% (101) said Yes, they did offer agritourism products/services
    • 28.4% (40) said No, they did not offer agritourism products/services

• 243 California Producer Survey respondents total
  – 231 non-duplicated complete surveys from producers
    • 81.3% (187) said Yes, they did offer agritourism products/services
    • 18.7% (44) said No, they did not offer agritourism products/services
Agritourism Gross Revenue - 2014

- Colorado
- California

- LESS THAN $1000: 6% (Colorado), 10% (California)
- $1000 - $4,999: 15% (Colorado), 15% (California)
- $5000 - $24,999: 24% (Colorado), 21% (California)
- $25,000 - $99,999: 15% (Colorado), 17% (California)
- $100,000 - $249,000: 17% (Colorado), 15% (California)
- $250,000 - $499,999: 9% (Colorado), 9% (California)
- $500,000 - $999,999: 8% (Colorado), 7% (California)
- $1M - $4,999,999: 8% (Colorado), 4% (California)
- GREATER THAN $5M: 0% (Colorado), 1% (California)
Number of Annual Visitors

Number of Visitors in 2014 (CO & CA combined)
# Age of Agritourism Businesses

<table>
<thead>
<tr>
<th>Age Category</th>
<th>Less Than 5 Years</th>
<th>5 - 19 Years</th>
<th>20 or More Years</th>
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<tbody>
<tr>
<td>Colorado</td>
<td>27%</td>
<td>40%</td>
<td>33%</td>
</tr>
<tr>
<td>California</td>
<td>24%</td>
<td>42%</td>
<td>34%</td>
</tr>
</tbody>
</table>

- **Colorado**: 27% less than 5 years, 40% 5-19 years, 33% 20 or more years
- **California**: 24% less than 5 years, 42% 5-19 years, 34% 20 or more years
Days Agritourism Operations Open

Number of days open in 2014

- 10 days or less: 3% (Colorado), 12% (California)
- 11 to 35 days: 9% (Colorado), 11% (California)
- 36 to 100 days: 20% (Colorado), 19% (California)
- 101 to 250 days: 45% (Colorado), 21% (California)
- 251 - 365 days: 23% (Colorado), 36% (California)

University of California
Agriculture and Natural Resources
Agritourism activities include...

- **On-farm Direct Sales** (U-pick, farm stands, dairy, wine, beer, farm products, etc.).
- **Accommodations/Lodging** (farm stays, guest ranch, B&Bs, camping, cabins, etc.).
- **Entertainment/Special Events** (harvest festivals, corn mazes, farm dinners, weddings, parties, etc.).
- **Outdoor Recreation** (picnicking, swimming, hunting, fishing, photography, horseback riding, snowmobiling, biking, etc.)
- **Educational Activities** (farm or ranch work experience, camps, classes, tours, tastings, demonstrations, petting zoos, etc).

From: Multi-institutional interdisciplinary research project – survey of 288 western agritourism operators as part of 3 year USDA grant: “Place-Based Innovation: An Integrated Look at Agritourism in the Western US”
Main Sources of Agritourism Revenue

- **California:**
  - Direct Sales: 61%
  - Accommodations: 6%
  - Entertain./Special Events: 8%
  - Outdoor Recreation: 4%
  - Educational Activities: 11%
  - Diversified: 10%

- **Colorado:**
  - Direct Sales: 33%
  - Accommodations: 16%
  - Entertain./Special Events: 14%
  - Outdoor Recreation: 14%
  - Educational Activities: 10%
  - Diversified: 13%
Estimated Profit by Primary Activity
(CA & CO combined)

- Direct Sales (N=117)
  - Loss, no profit: 21%
  - Less than $2500: 18%
  - $2500 to $25,000: 22%

- Accommodations/Outdoor recreation (N=28)
  - Loss, no profit: 11%
  - Less than $2500: 4%
  - $2500 to $25,000: 43%
  - More than $25,000: 43%

- Entertainment, Special Events, Educational Activities (N=44)
  - Loss, no profit: 20%
  - Less than $2500: 20%
  - $2500 to $25,000: 18%
  - More than $25,000: 41%

- Diversified (N=20)
  - Loss, no profit: 25%
  - Less than $2500: 25%
  - $2500 to $25,000: 35%
  - More than $25,000: 15%

California: N=141		Colorado: N=71
Agritourism Challenges:
Percent of Respondents Rating Each Issue "Challenging" or "Very Challenging"

- Management time and expertise *
- Marketing (promotion & advertising *)
- Availability of operating or investment capital *
- Family or business labor
- Cost and/or availability of insurance
- Other state or local regulations*
- City/County permitting & zoning *
- Local & state taxes
- Ensuring visitor safety and accessibility
- Competition from other local recreational options*
- Developing and implementing a business plan

![Bar chart showing the percentage of respondents rating each issue as challenging or very challenging for California and Colorado.]

- California
- Colorado
Agritourism requirements

- Visitor/employee skill-building
- New regulations
- Additional risks
- New partners
- Community support
Helpfulness of Community Resources

Percent of respondents rating each "helpful" or "very helpful"

- Farm or wine trail, agritourism association *
- Tourism bureau, Chamber of Commerce *
- Neighboring farms, adjacent landowners
- Other local tourism, recreation & retail businesses
- Local eating & dining places
- Local motels, hotels, B&Bs, campgrounds
- Small Business Development Center, University...
- County/municipal planning & zoning dept.

* Difference significant at 90% confidence level
Thank you!

Questions?

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