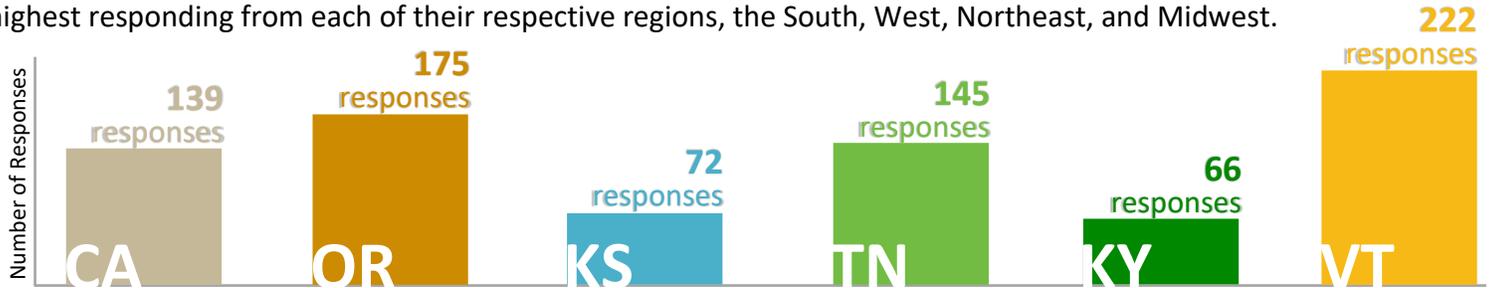


Survey of Agritourism including On-farm Direct Sales in the United States

Comparison of Selected States

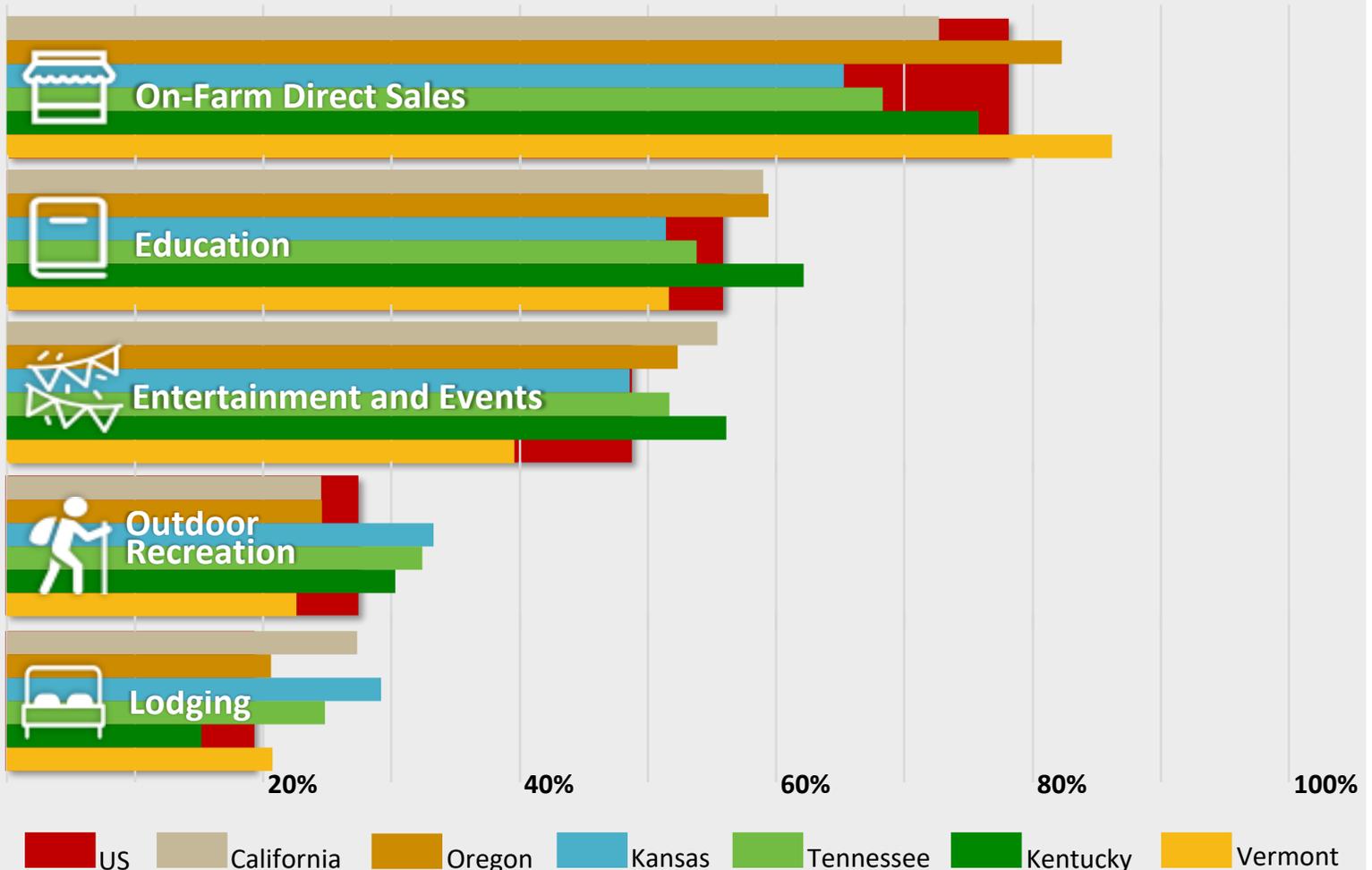
Between November 2019 and February 2020, 1834 farmers, ranchers, and vineyard operators representing all 50 states in the U.S. completed an online survey about agritourism including on-farm sales. For more information and other summaries, visit <https://www.uvm.edu/vtrc/agritourism-survey>.

Survey respondents from six states accounted for 45% of total responses (819 respondents). These states are the highest responding from each of their respective regions, the South, West, Northeast, and Midwest.



Types of Agritourism Activities

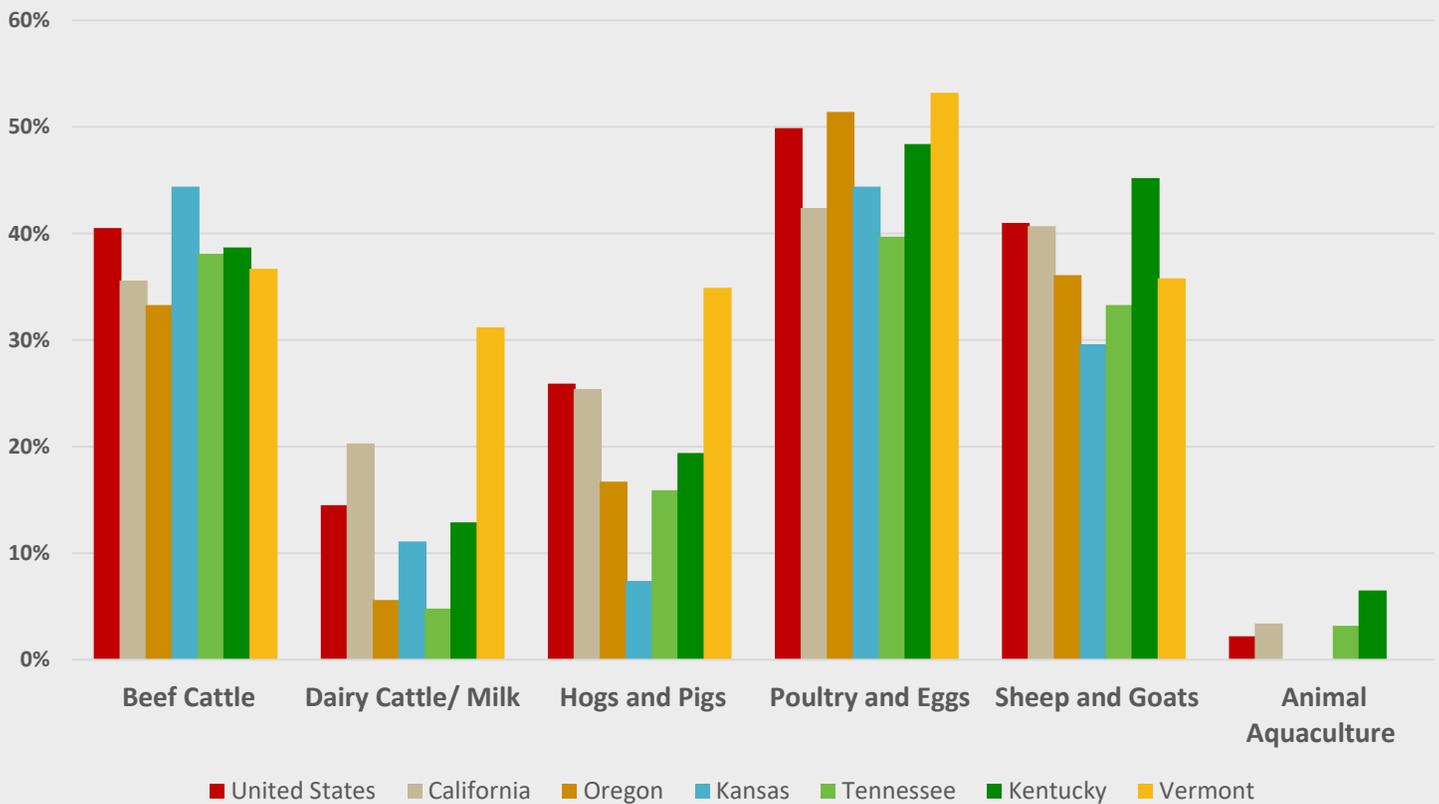
Each category of agritourism was offered in each state. The most common activity for every state was on-farm direct sales. As shown in the chart below, Vermont (86%) and Oregon (82%) had the highest number of respondents offering on-farm direct sales, higher than the national rate. The next most common experiences in each state except Vermont were educational experiences, and events and entertainment. These results are shown in the chart below, superimposed on the average responses from all states in the United States noted in red.



State Product Comparisons

The graphs below illustrate how the prevalence of specific crops, animal products, and value-added goods differ from state to state on responding farms. Additional information on each state can be found at the end of this document.

Animals and Animal Products



The prevalence of each type of animal raised varies from state to state, with each state standing out in one or more categories. A smaller percentage of farmers in each state raised beef cattle relative to responding farmers nationally, with the exception of Kansas, which had the highest rate of cattle raising of these states. Vermont and California both stand out for their higher-than-average dairy production. Out of the six states compared, these two states also had the highest percentage of farmers raising hogs and pigs.

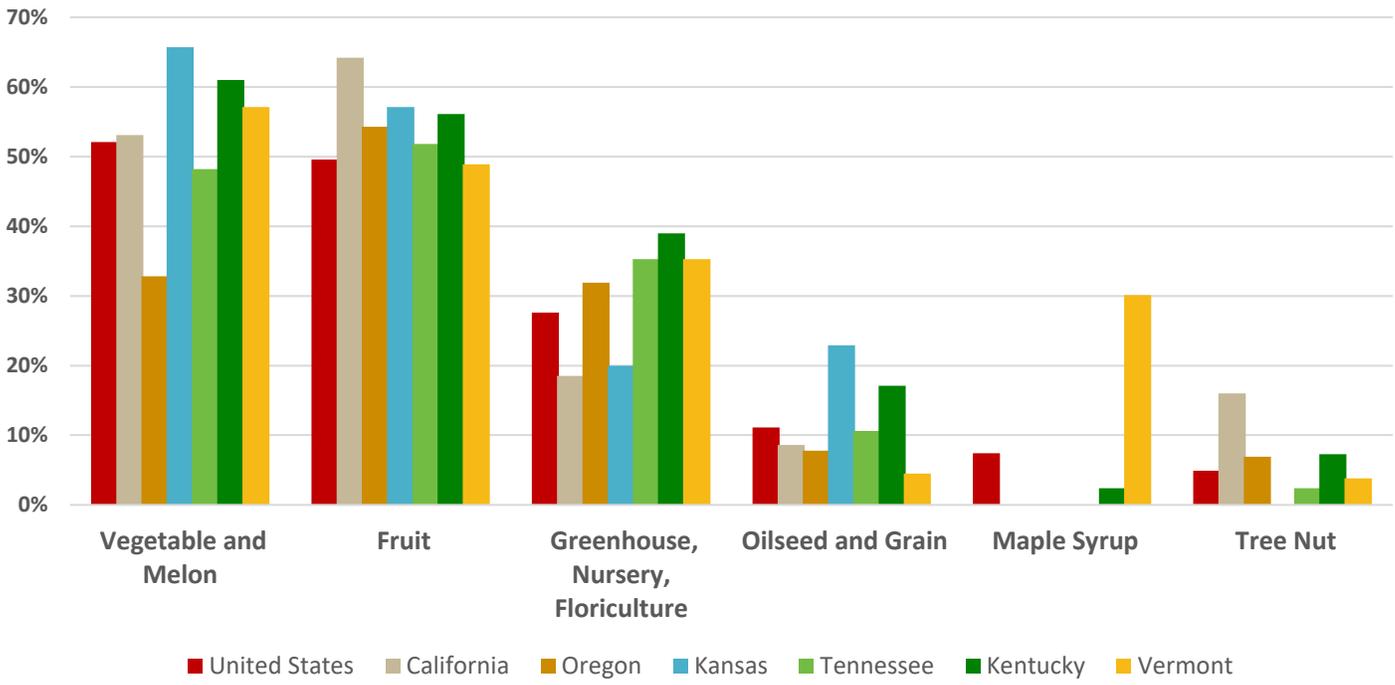
Oregon, which had relatively fewer farms raising animals than other states in most categories, had the second highest percentage of farms raising poultry and eggs, behind only Vermont. Sheep and goats were more common in Kentucky than any other state. Finally, aquaculture was around three times more prevalent in Kentucky than in the rest of the US. California and Tennessee also had a relatively high presence of aquaculture in agritourism operations.

Crops

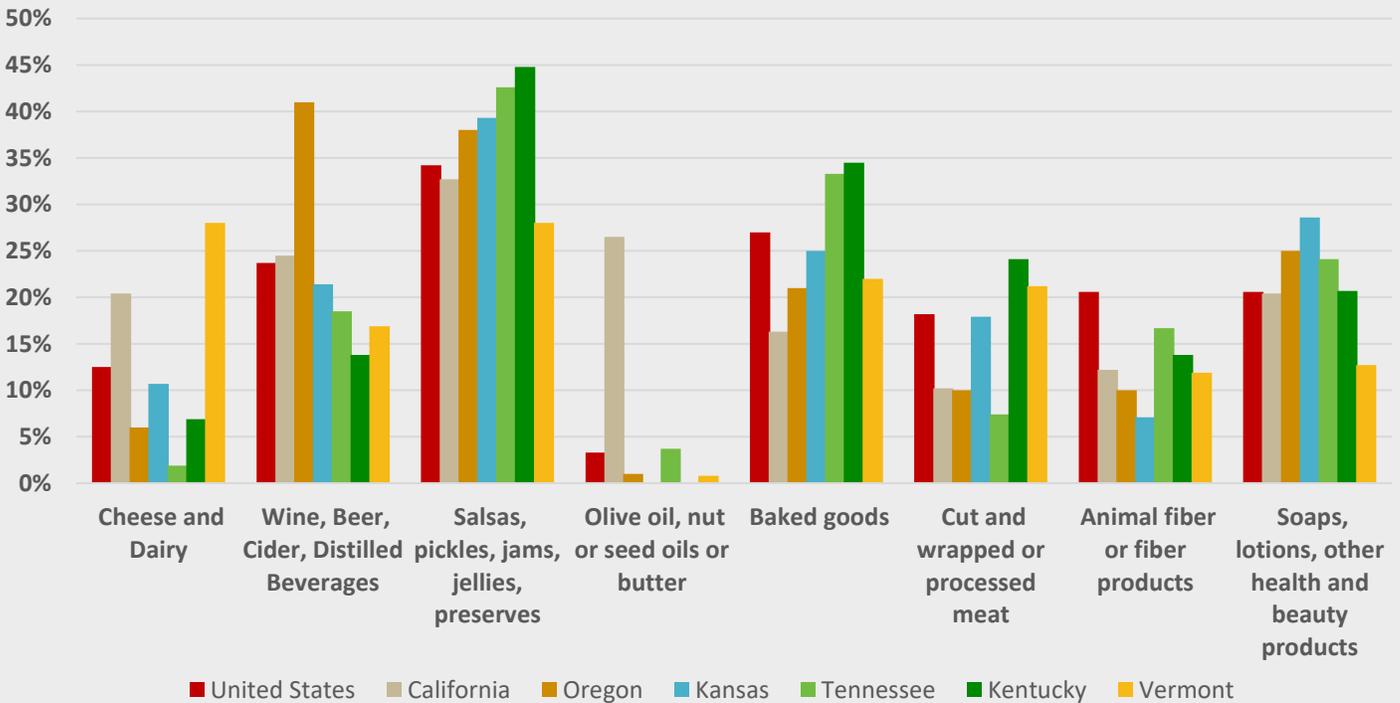
Crop production on farms offering agritourism was quite varied. Kansas had the highest percentage of farms growing vegetables and melons, followed by Kentucky, Vermont, and California, all of which grew vegetables and/or melons at a higher rate than farms nationally. California had the highest rate of fruit production of the states compared by a good margin, though all states in this comparison had relatively high numbers of farms growing fruit.

Kentucky had the highest percentage of farms with greenhouses, nurseries, or floriculture, followed by Tennessee and Vermont. Only two states saw oilseed and grain production at a rate higher than the national average, Kansas and Kentucky. Vermont was by far the largest producer of maple syrup. Other than Vermont, only Kentucky had any agritourism operations which produced maple syrup. Finally, California had the highest percentage of operations producing tree nuts.

Crops (cont'd)



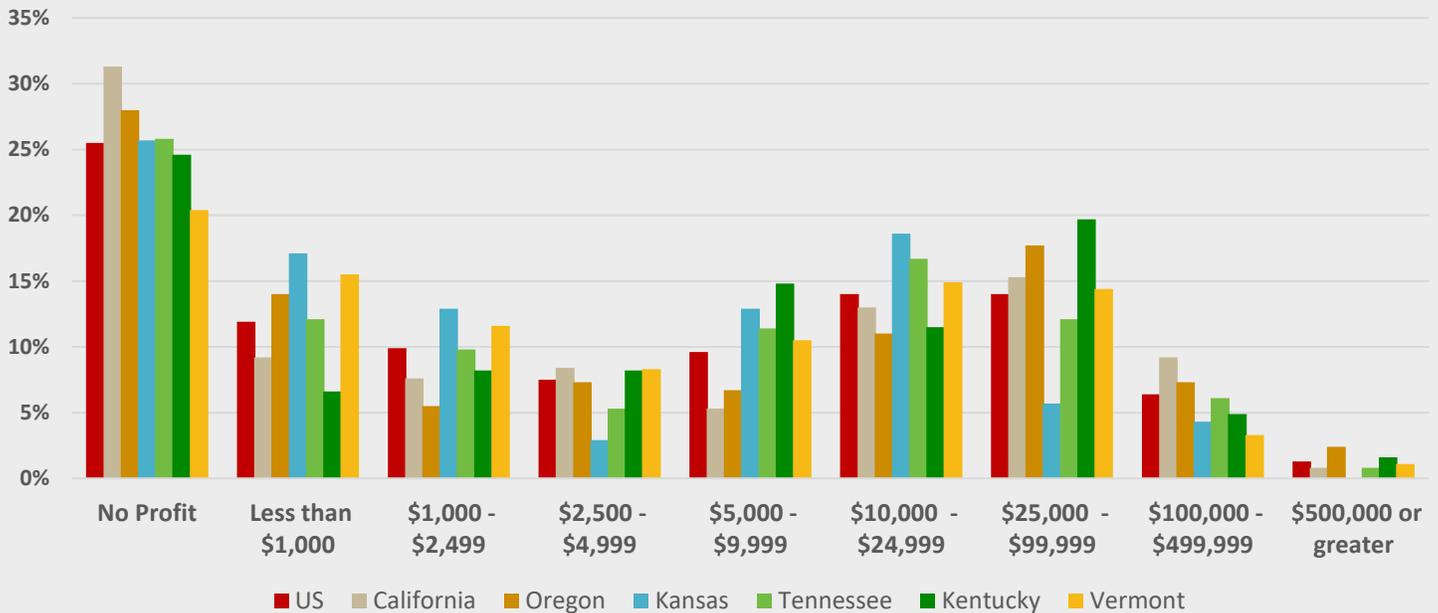
Value-added Products



Vermont had the highest percentage of farms producing dairy, followed by California. Oregon had the highest percentage of agritourism operations producing alcoholic beverages, followed distantly by California. Salsas, pickles, jams, jellies, and preserves were common products for many states in this comparison, including Kentucky, Tennessee, Kansas, and Oregon. Olive oil and/or nut or seed oils or butter was not prevalent on farms in any state in this comparison except California, where these products can be found on over a quarter of farms. The two southern states, Kentucky and Tennessee, were the most likely to provide baked goods. Kentucky and Vermont were more likely to offer cut and wrapped or processed meat than operations across the United States as a whole. No states offered animal fiber or fiber products at a rate higher than the national average, but among the states in this comparison, Tennessee and Kentucky were the most likely to offer these products. Finally, Kansas, Oregon, and Tennessee were the top 3 relative producers of beauty products.

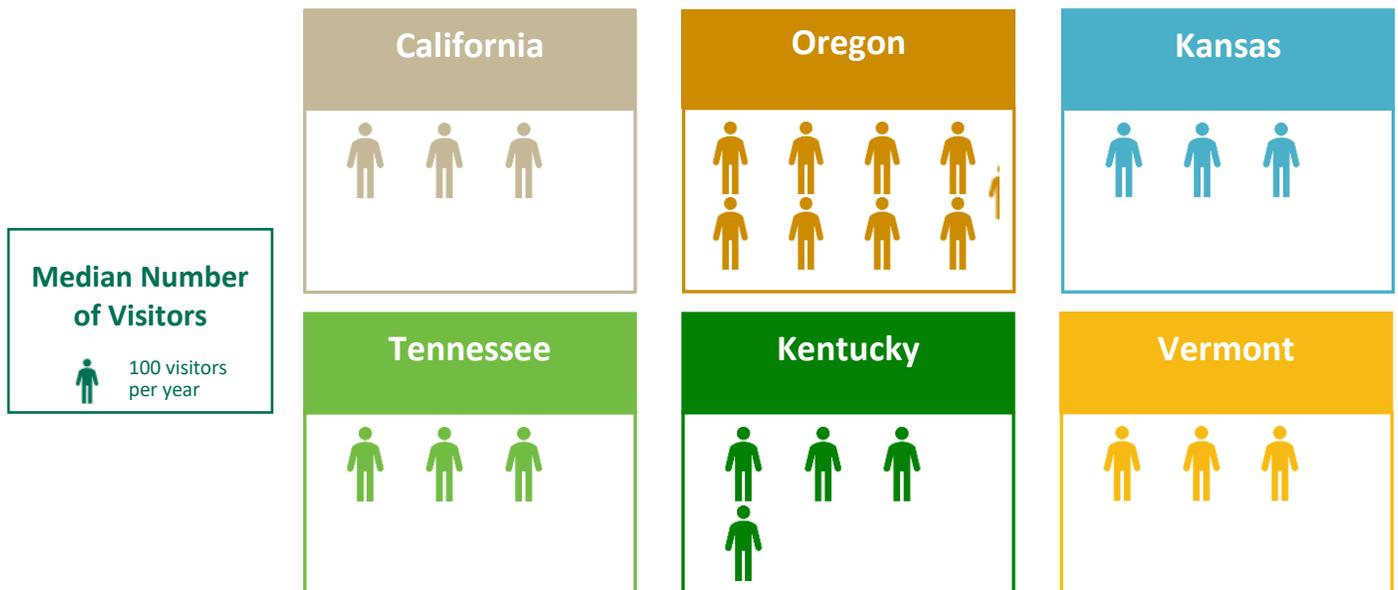
Profitability of Agritourism

With the exception of Vermont, around a quarter of respondents in each state (31% in California) reported that their agritourism operation operated at a loss or had no profit. Oregon stands out for being the only state in which a respondent reported agritourism profits at or above \$1 million. Aside from this outlier, each state had a similar distribution – a high percentage of operations in the “no profit or operated at a loss” category, then a dip in the lower profit categories, followed by a bump in responses between \$5,000 and \$99,999 profit.



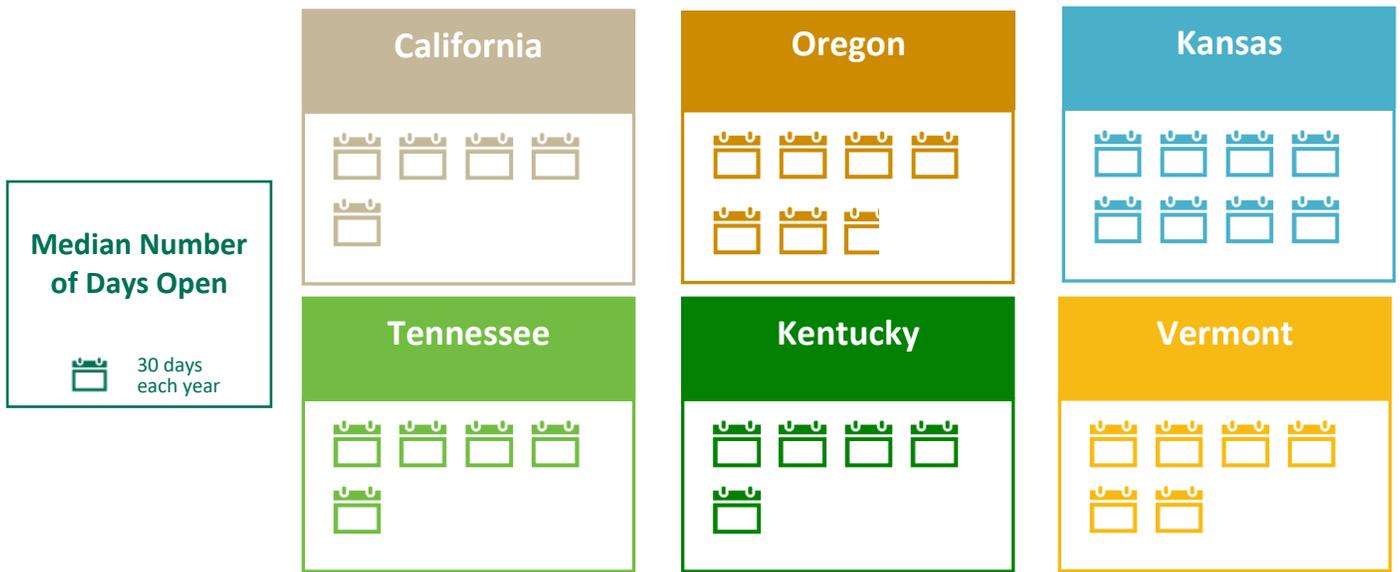
Number of Visitors

Operations in Oregon, on average, had the most visitors per year (median 825), followed by Kentucky (median 400), and then California, Kansas, Vermont, and Tennessee (each with median 300).



Number of Days Open

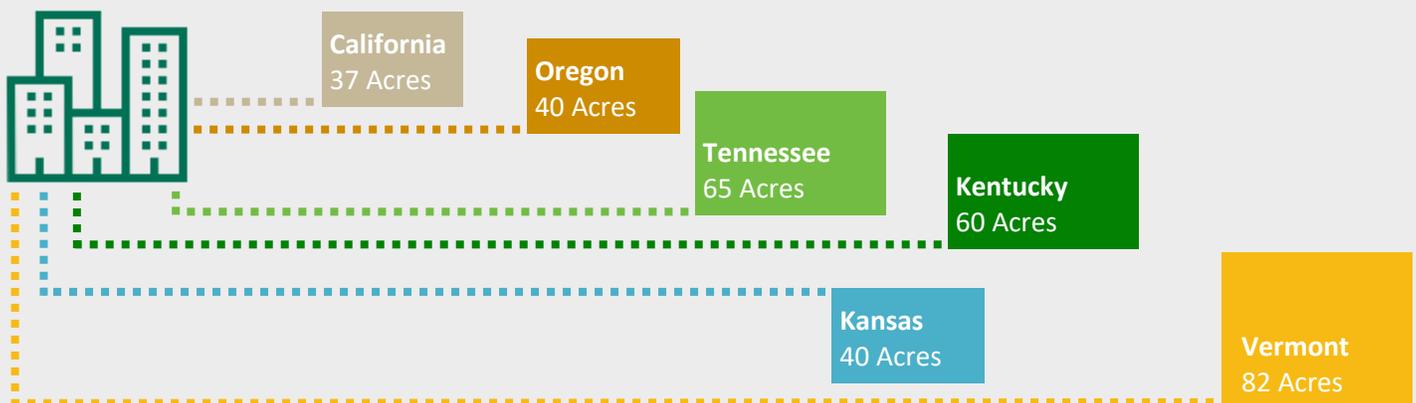
Kansas operations were open the most days each year, followed in order by Oregon, Vermont, Tennessee, Kentucky, and California



Farm Size and Proximity to Cities

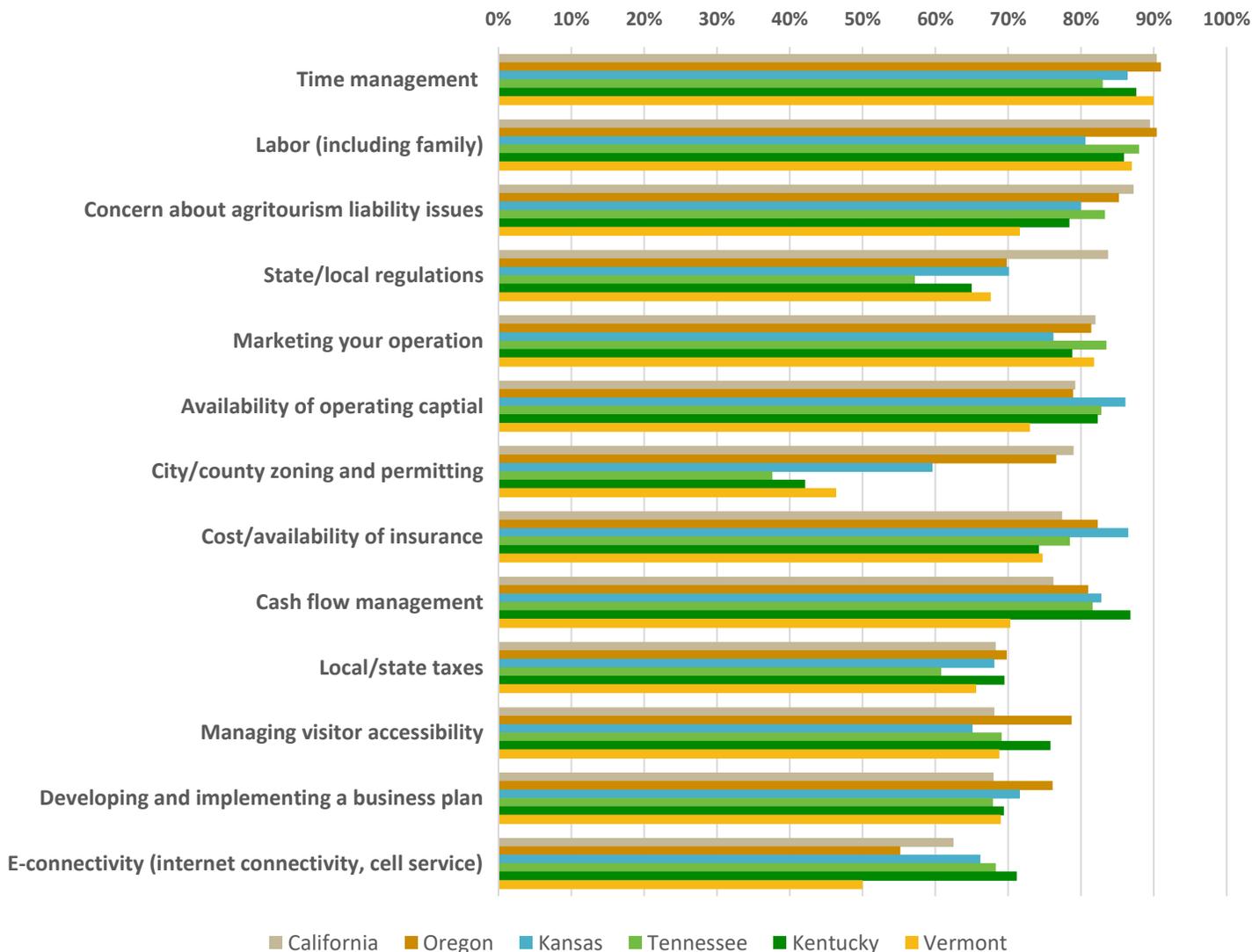
The median farm size varied between states. Vermont respondents reported the largest median farm size (82 acres), followed by Tennessee (65 acres), Kentucky (60 acres), Oregon and Kansas (both with 40 acres), and finally California (37 acres). The national median of responding farms was 60 acres.

Farms in Vermont were the furthest from cities of 50,000 people, likely due in part to the fact that Vermont's largest city itself does not have more than 50,000 people. Two-thirds of Vermont farms (67%) were located more than 50 miles from a city. In contrast, Californian farms were much closer to cities, with 38% of farms established within 10 miles of a city (10% operating within a city of 50,000 or more, the highest among the six states) and another 30% operating between 10 and 29 miles of a city. Behind California, Oregon operations were the next closest to cities, followed by Tennessee, then Kansas and Kentucky.



Challenges

Each of the states in this comparison had many respondents identify time management, labor (including family), concern about agritourism liability issues, marketing agritourism operations, availability of operating capital, cost or availability of insurance, and cash flow management as some of their most common challenges. Zoning and permitting was a top ten challenge in Oregon and California (it was not ranked as high in other states), while e-connectivity was the ninth most frequent challenge for respondents from Tennessee and Kentucky.



What Supports Do Operators Need?

Supports requested by operators in all six states included: social media marketing and management, legal and liability information, and resource materials for the public on where to locate local agritourism enterprises. Another three supports were among the top needed in five of the six states in this comparison: marketing plan development, website management, and information on types of agritourism offerings. Support with zoning regulations was identified as a commonly needed support in Oregon and California, where zoning was a challenge.

This work is supported by Critical Agriculture Research and Extension (CARE) grant no. VTN32556 from the USDA National Institute of Food and Agriculture and Agriculture Marketing Resource Center (AgMRC), located at Iowa State University, www.agmrc.org. AgMRC is a national website dedicated to providing information to producers and service providers on value-added agriculture businesses. Any opinions, findings, conclusions, or recommendations expressed in this publication are those of the authors and do not necessarily reflect the view of the U.S. Department of Agriculture. UVM Extension helps individuals and communities put research-based knowledge to work. Issued in furtherance of Cooperative Extension work, Acts of May 8 and June 30, 1914, in cooperation with the United States Department of Agriculture. University of Vermont Extension, Burlington, Vermont. University of Vermont Extension, and U.S. Department of Agriculture, cooperating, offer education and employment to everyone without regard to race, color, national origin, gender, religion, age, disability, political beliefs, sexual orientation, and marital or familial status. Any reference to commercial products, trade names, or brand names is for information only, and no endorsement or approval is intended.