


Oregon Agritourism Working Group Meeting #2

May 15, 2014

Agenda

- Take-aways from meeting #1
- More on definition, data, trends
- Long term vision- reconstruct
- 10 year goals- brainstorm and prioritize
- Two year strategy- brainstorm ideas
- Next steps

Oregon Agritourism Strategy Process



MARCH- Convene,
Share info,
identify
opportunities and
issues, draft vision

APRIL/MAY-
Refine vision.

Establish five
year goals
and potential
strategies for
the next two
years.

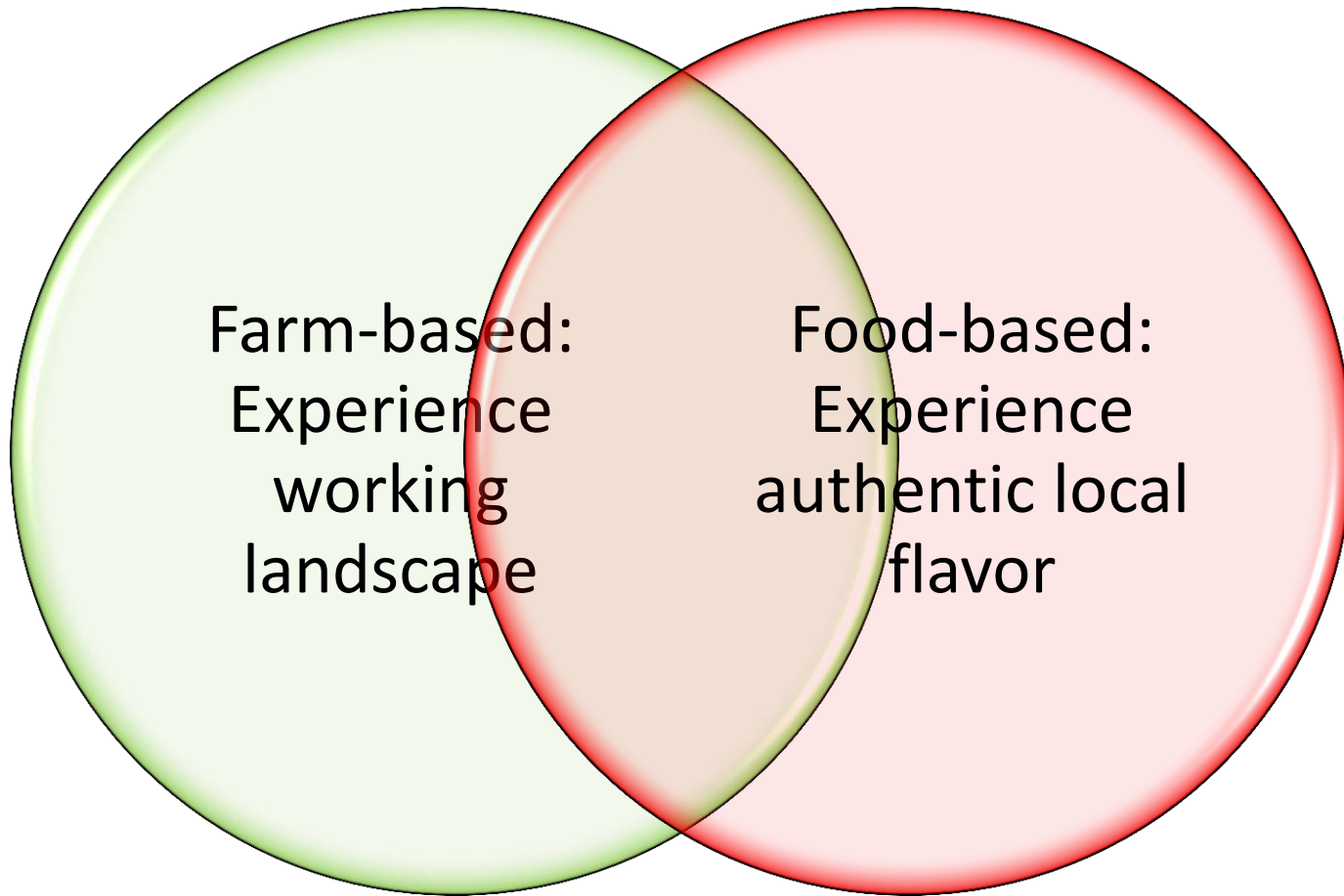
MAY- Reach out
to other key
stakeholders to
gain input on
strategy ideas

MAY/JUNE-
Prioritize
strategies,
develop action
plan

JUNE-
Partnership to
implement in
place

Action!

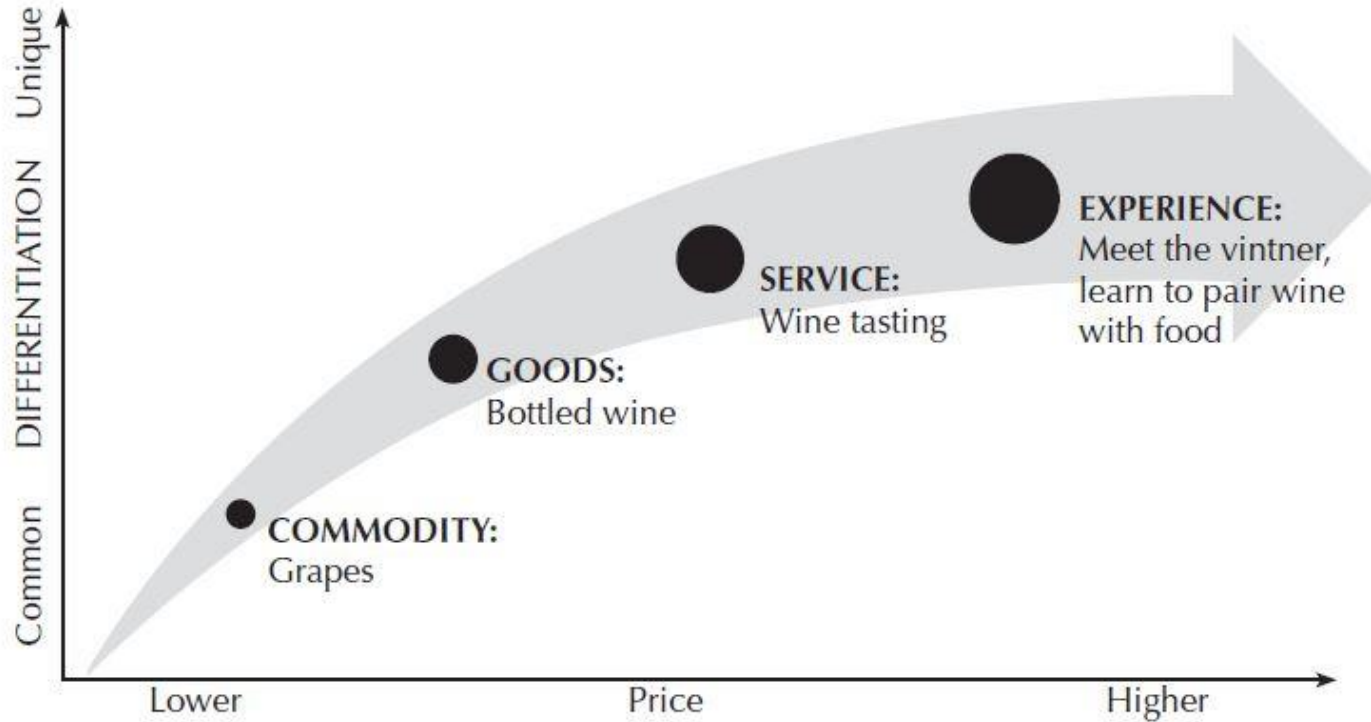
Working Definition



Experiences!

PRODUCTS VS EXPERIENCES

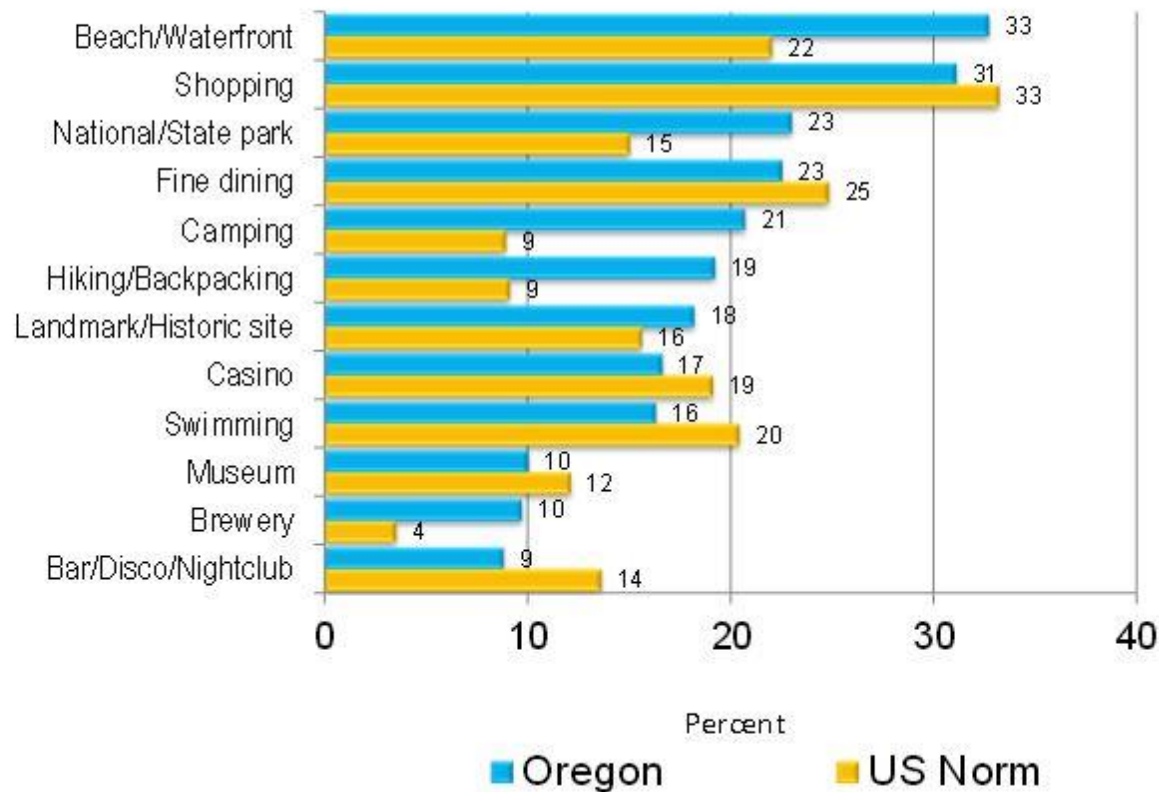
THE PROGRESSION OF ECONOMIC VALUE*



Activities and Experiences



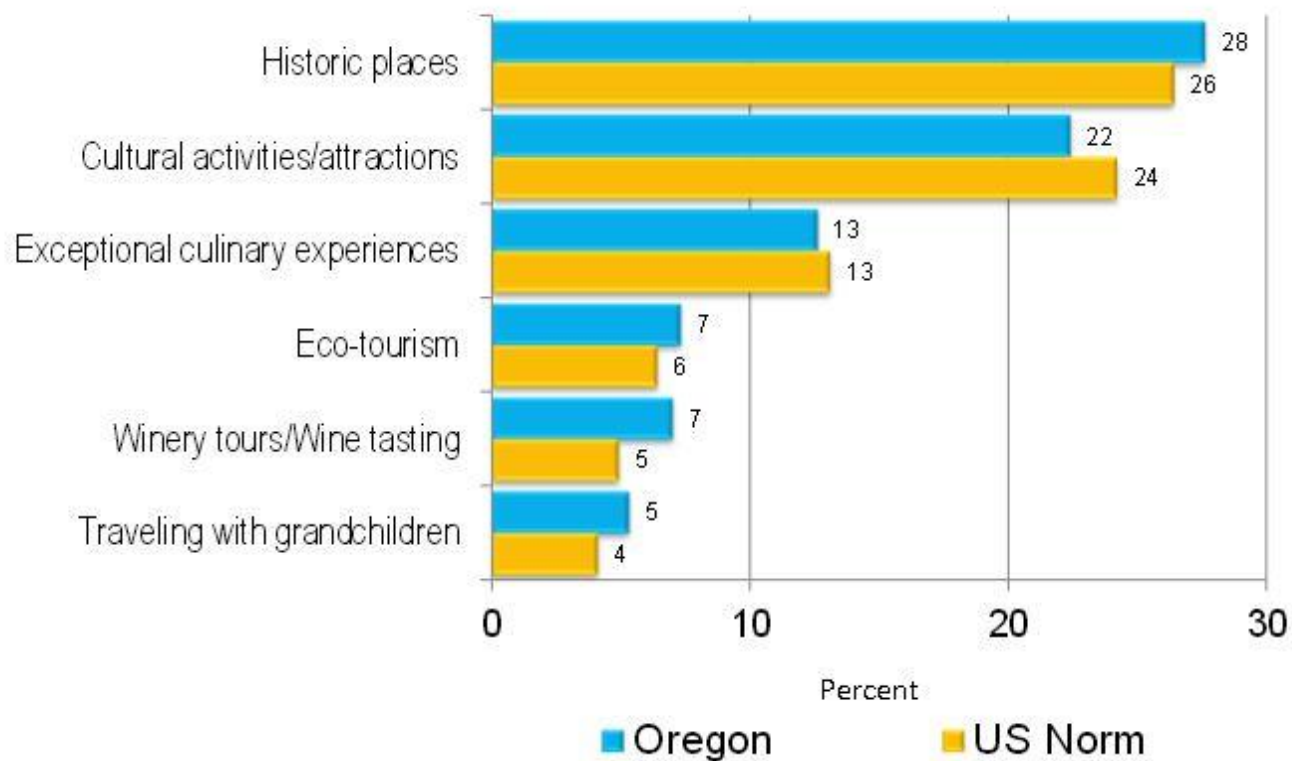
Base: Overnight Marketable Trips



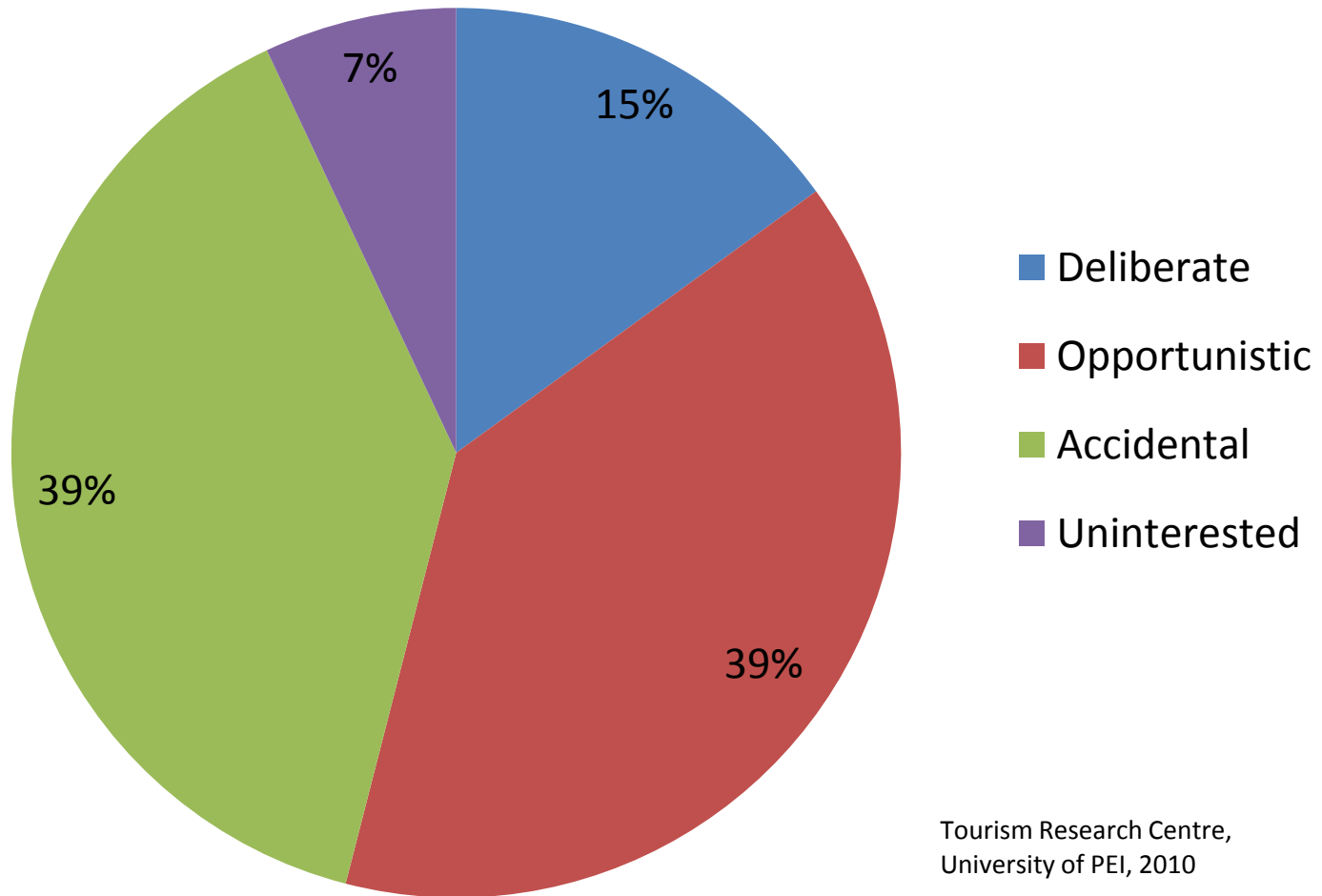
Activities of Special Interest



Base: Overnight Marketable Trips



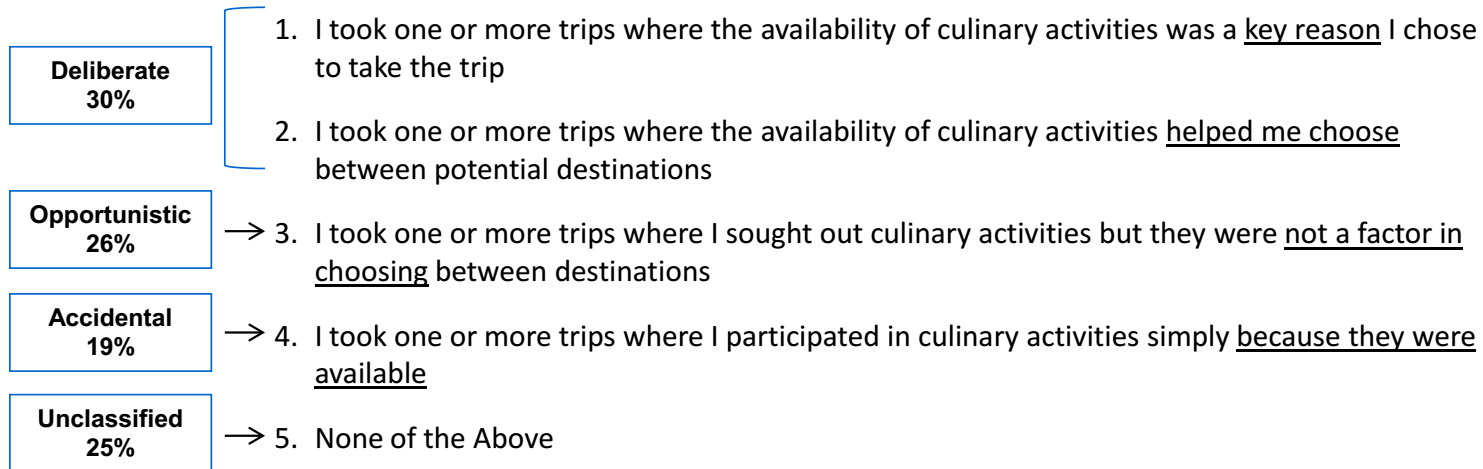
Why collaborative approaches matter



Defining Culinary Travelers, Cont'd

Leisure travelers who are classified as Culinary travelers can be further segmented according to the drivers of the trips they have taken over the past three years. They were asked:

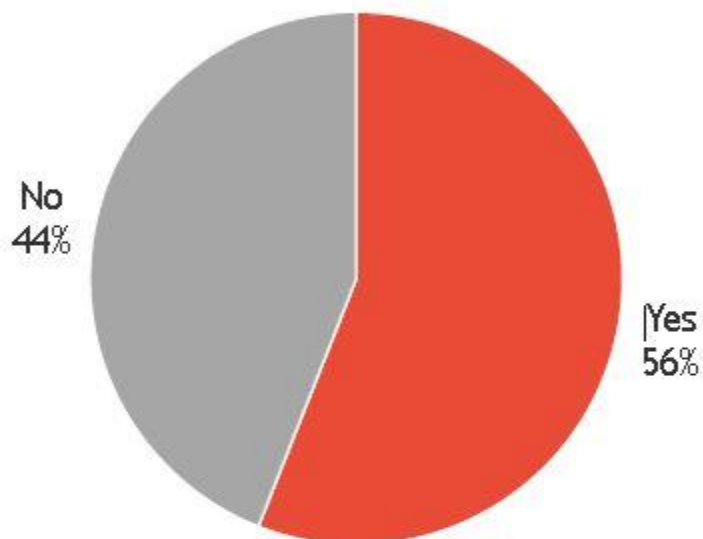
Thinking about all the trips you have taken over the past three years in which you participated in culinary activities (cooking classes, dining out for an unique and memorable experience, farmers markets, gourmet food shopping, etc.) or attended food festivals, which if any, of the following applies to you? (Please select all that apply)



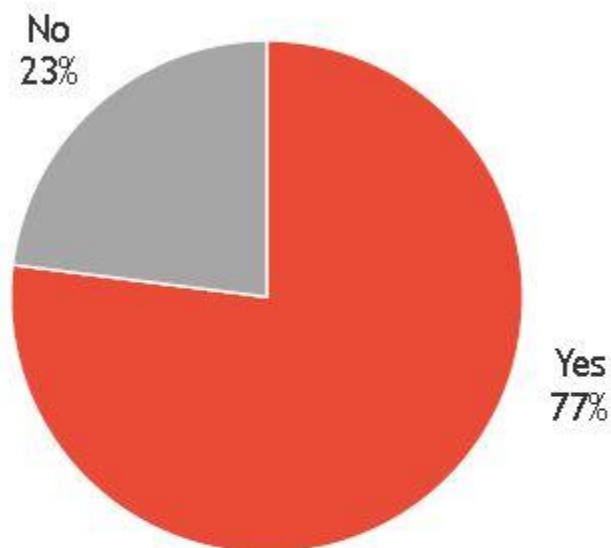
Because different trips have different purposes, respondents were allowed to select multiple answers to this question. For the purposes of this report, however, culinary travelers are placed in the segment that includes the highest level of impact that culinary travel had on their destination choice. (For example, if a respondent selected both response #2 and #3 above, they were placed into the Deliberates segment.)

TRAVEL OREGON

OREGON AND CULINARY EXPERIENCES*



Participated in Culinary Experience in Oregon Visit in the Past Two Years



Planned to participate in a culinary experience in Oregon before departing from home for the trip

- According to the April 2013 *travelhorizons*TM survey, six out of ten (56%) adults who visited Oregon in the past two years said they participated in culinary experience while visiting Oregon – no substantial difference from data combined from the previous four surveys;
- Eight out of ten (77%) of those who participated in a culinary experience said they planned to participate in the culinary experience in Oregon before departing from home – 13 points higher than results from the combined surveys.

QOR5. During this/these Oregon trip(s) did you participate in a culinary experience? Base: Visited Oregon in the past two years.

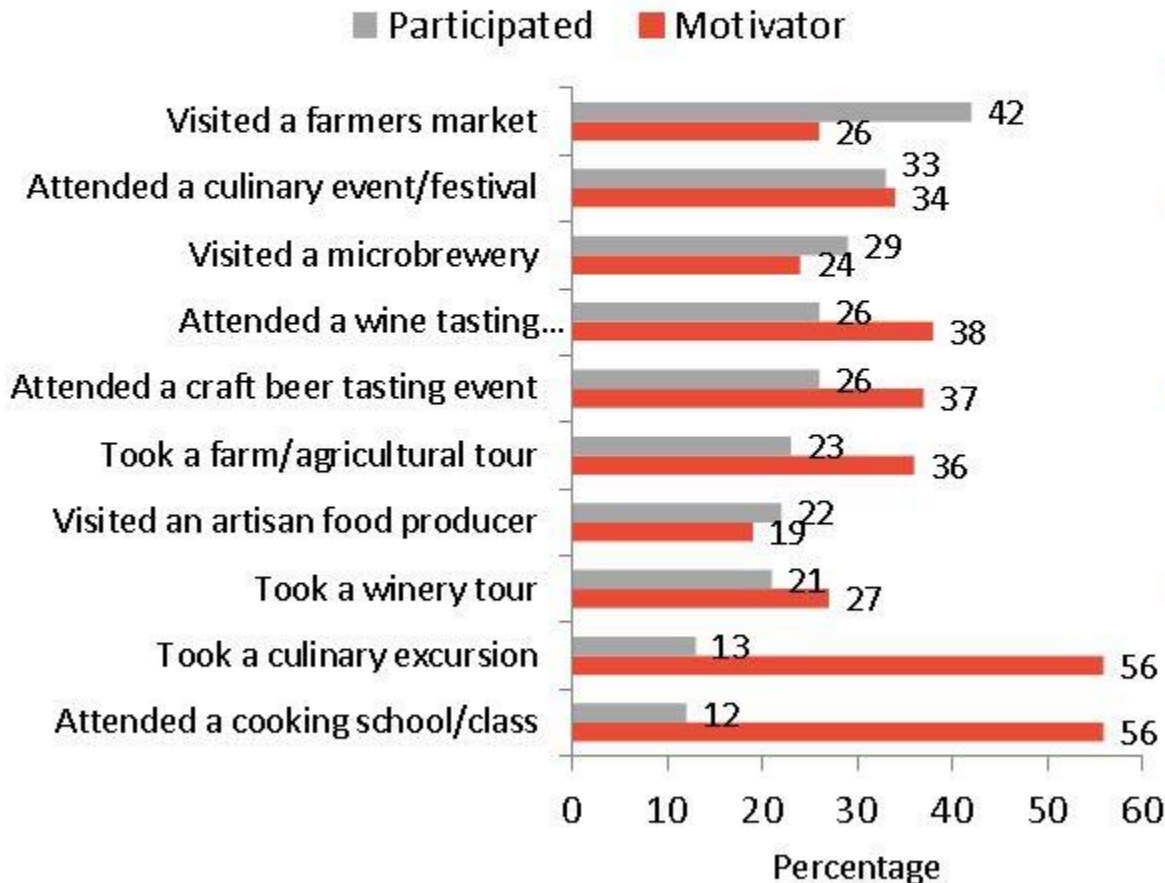
QOR6. Did you plan to participate in a culinary experience in Oregon before you departed home for the trip? Base: Visited Oregon/Participated in a culinary activity

*A culinary experience can include a winery tour, visiting a microbrewery, participating in Oregon wine or craft beer tastings, seeking out local cuisine, visiting an artisan food producer, attending a culinary event, visiting a farmers market, participating in an agricultural tourism activity and so forth.



TRAVEL OREGON

CULINARY ACTIVITIES



- Among the wide range of culinary activities, four out of ten (42%) Oregon visitors who participated in a culinary event said they visited a farmers market;
- One in three (33%) attended a culinary event or festival and another one out of three said they visited a microbrewery (29%);
- Nearly an inverse relationship exists between participation in the various culinary events and the extent to which the events serve as a motivator for visiting Oregon;
- For example, 12% of past Oregon visitors said they attended a cooking school or class – lowest among the activities included on the survey; yet, of those who attended a school or class, six out of ten (56%) said it was a primary motivation for visiting Oregon;
- On the other hand, farmers markets topped the list of activities in which Oregon visitors participated (42%), but ranked towards the bottom as a motivator for visiting Oregon (26%).



Culinary Tourism Destinations in the U.S. – Top 20

**Culinary Tourism: "Travel to learn about or enjoy unique and memorable eating and drinking experiences – not necessarily just those that are exclusive or highly acclaimed, but all memorable eating and drinking experiences."*

US Culinary Destinations (Open End)	Total	Culinary	Deliberate	Opportunistic	Accidental
Sample Size	2113	1618	483	428	305
New York City, NY	46%	50%	51%	60%	47%
New Orleans, LA	38%	40%	40%	46%	46%
San Francisco, CA	21%	23%	22%	28%	23%
Chicago, IL	21%	23%	25%	27%	26%
Napa Valley/Wine Country, CA	12%	15%	13%	18%	16%
Texas - All Other	11%	11%	10%	13%	12%
Boston, MA	11%	12%	14%	10%	17%
South Atlantic – Region	11%	11%	11%	12%	12%
California - All Other	10%	11%	13%	12%	11%
Los Angeles, CA	8%	8%	9%	9%	9%
Miami, FL	7%	8%	7%	10%	8%
Mountain - Region	7%	8%	8%	8%	8%
Maine - All Other	7%	7%	8%	8%	5%
New England- Region	6%	7%	6%	10%	7%
Florida - All Other	6%	6%	7%	11%	7%
Las Vegas, NV	6%	7%	9%	6%	6%
Louisiana – Other	6%	6%	7%	6%	6%
Seattle, WA	6%	5%	9%	9%	6%
Memphis, TN	5%	4%	6%	9%	4%
East South Central - Region	5%	5%	5%	7%	6%

When asked what destinations in the U.S. come to mind for Culinary tourism, New York City is number one, followed by New Orleans, San Francisco, and Chicago.

The East (NY), West (San Francisco, Napa), Midwest (Chicago) and Gulf Coast (New Orleans) are all represented in the top 5 “top-of-mind” Culinary tourism destinations.

There are few differences between Culinary travelers and all leisure travelers in top-of-mind domestic Culinary tourism destinations.

Statistically significant

Participation in Beer-related Activities – Top 20 Destinations

Destinations	Culinary Total	Gen Y (18-29)	Gen X (30-44)	Baby Boomers (45-64)	Matures (65+)	<\$75K	\$75K+
Sample Size	411	91	149	128	43	256	139
Portland, OR	11%	6%	15%	10%	7%	12%	9%
Boston, MA	9%	11%	12%	7%	4%	10%	9%
Denver, CO	9%	14%	10%	4%	8%	9%	8%
New York City, NY	7%	8%	8%	7%	0%	7%	6%
Chicago, IL	6%	9%	6%	6%	5%	7%	5%
Las Vegas, NV	6%	4%	9%	4%	0%	5%	7%
San Francisco, CA	5%	11%	4%	2%	2%	5%	4%
Seattle, WA	5%	7%	5%	2%	5%	6%	3%
Honolulu, HI	5%	3%	6%	6%	0%	5%	4%
San Diego, CA	5%	6%	6%	3%	2%	5%	4%
Philadelphia, PA	5%	9%	5%	1%	1%	4%	4%
St. Louis, MO	4%	9%	3%	3%	4%	4%	6%
Phoenix/Scottsdale, AZ	4%	5%	2%	4%	7%	4%	4%
Orlando, FL	4%	1%	5%	6%	0%	5%	2%
Nashville, TN	4%	5%	3%	5%	2%	5%	3%
Miami, FL	4%	2%	8%	2%	0%	5%	2%
Cincinnati, OH	4%	3%	5%	4%	0%	4%	3%
Dallas/Fort Worth, TX	4%	1%	5%	5%	2%	4%	3%
Austin, TX	4%	2%	5%	4%	3%	3%	5%
Detroit, MI	4%	3%	8%	1%	0%	4%	3%

Census Regions	Total
WEST (NET)	33%
SOUTH (NET)	30%
NORTHEAST (NET)	23%
MIDWEST (NET)	20%

Beer-related activities are spread all across the country, with no specific destination receiving more than a small share of brewery visitors.

Portland, OR is the most frequently visited destination for those who participate in beer-related activities, followed closely by Boston and Denver.

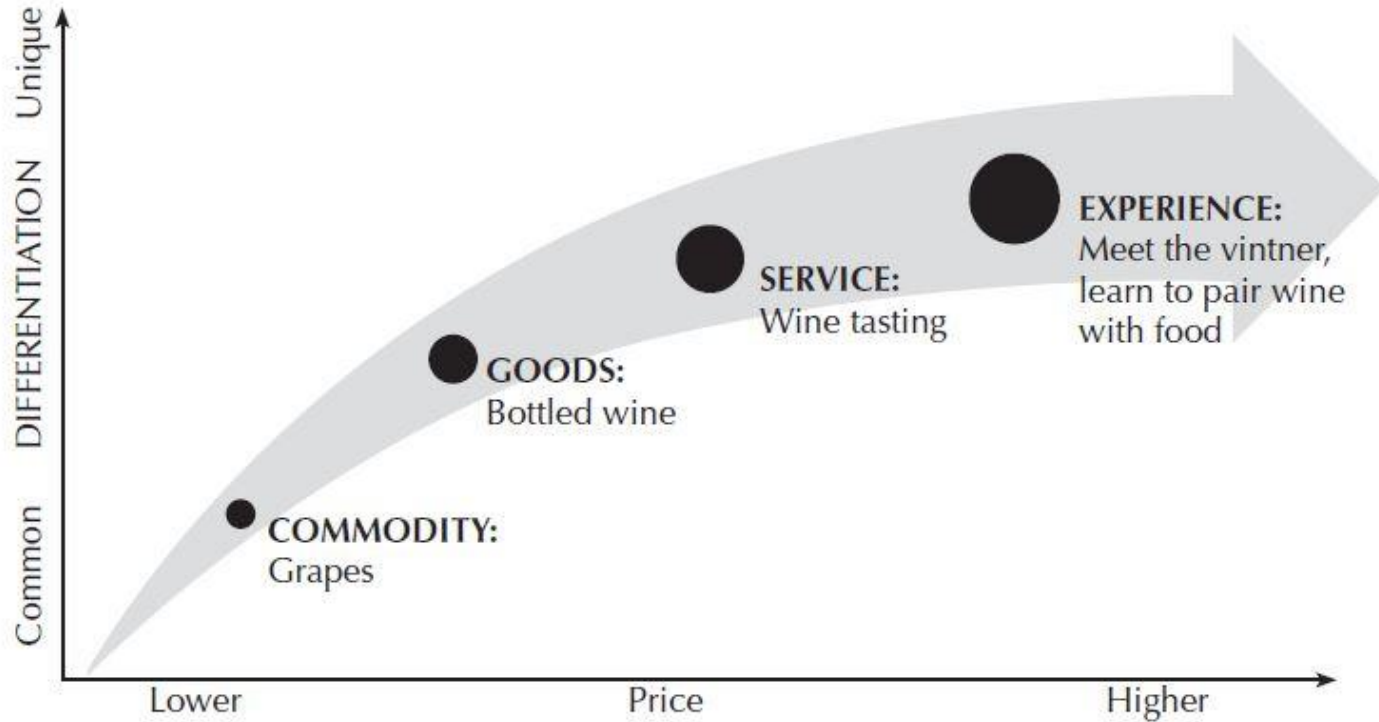
Statistically significant

Q30a. What was the location/region of the most recent trip you took in which you participated in brewery activities? [Base: Engaged in any culinary travel & participated in beer-related activities: n=411] [Multiple Response]

Experiences!

PRODUCTS VS EXPERIENCES

THE PROGRESSION OF ECONOMIC VALUE*



Growing Agritourism in Oregon

April 29, 2014 | Oregon Governor's Conference on Tourism

Facilitator

David Blair

Consultant to Travel Oregon

Presenters

Meghan Sheridan

Vermont Fresh Network

Jeanne Carver

Imperial Stock Ranch





IMPERIAL
STOCK RANCH

EST 1871

VERMONT FRESH NETWORK



FARM & CHEF PARTNERSHIP

161 Chefs, 36 Institutions (colleges, hospitals, k-12 and nursing homes),
5 Food Markets, 3 Food Distributors, 90 Farmers, 34 Food Producers

Ag. and Culinary Tourism Council Members

- Vermont Fresh Network
- Northeast Organic Farmer Association - VT
 - Vermont Cheese Council
 - Vermont Grape & Wine Council
 - Vermont Maple Producers
 - Vermont Farms Association
 - Vermont Brewers Association
- Vermont Farmers Market Association
- Tree Fruit Growers Association
- New England Culinary Institute



Mission: Promote Vermont agriculture and culinary tourism by making it easy for people to find and participate in authentic Vermont food experiences.



Search



DIG IN to VERMONT
PLACES

DIG IN to VERMONT
EVENTS

DIG IN to VERMONT
TRAILS

DIG IN to VERMONT
REGIONS

DIG IN VERMONT
BLOG

Listing Criteria for DigInVT



MY PLACES

Criteria for Inclusion on DigInVermont

In order to be included on this site, the appropriate Council member has verified that all listings met the following criteria:

- Comply with all applicable regulations
- Provide a safe and welcoming environment for visitors
- Offer a product of which 75% originates in Vermont or 85% of its value is finalized in VT*
- Be open and set up for visitors seasonally or year round with visiting times clearly communicated
- Be an active member in good standing of at least 1 organization represented on the Council.

*The Vermont Fresh Network, Vermont Grape and Wine Council, and Vermont Farms Association modified this criteria to better fit their membership (see below).

About Us

Contact Us

Listing Criteria

Vision

In 2025:

- What is different about farms and ranches?
- What is different about the visitor experience?
- What is different about life in Oregon communities?

Ten Year Goals

Given the vision what are specific (measurable) goals we should pursue? e.g. (*only examples*)

- *Increase the number of agricultural operations with culinary/agritourism income*
- *Increase the number of visitors who participate in culinary/agritourism activities*
- *Increase prominence of Oregon as a destination for diverse, high quality culinary/agritourism experiences in Oregon*

Two year strategies

Strategy is a verb! *(only examples)*

- *Build a web presence that integrates working landscape and food experiences*
- *Foster productive networking between rural producers and urban markets*
- *Develop “epic” regionally focused experiences*
- *Tie culinary/agritourism experiences more closely with outdoor recreation markets*
- *Address policy barriers to expanding culinary/agritourism activities on the working landscape.*



Children at Leaping Lamb Farmstay, Alsea