



Market Trends for Agritourism: Information from Other Regions

Agritourism can attract visitors with diverse interests and market profiles. This is because “agriculture is one of the few industries that tap our connections with the natural world as well as our cultural past. Farms are unique repositories of biological, historical and cultural wealth, and thus hold a fascination for many people. Agritourism provides an opportunity for people to experience a real change of pace, get closer to nature, learn how food is produced and farmers live, and have a good time and memorable experience while doing it.” (Washington State University Extension—Agritourism: Cultivation Tourists on the Farm, 2008)

The big picture is that Oregon’s farms and ranches are well positioned to take advantage of many favorable market trends. At the same time, there are differences in market opportunities based on specific location and amenities. This document summarizes market trends from several state and national-level studies. For more detailed trend information, refer to the reference documents. As new data becomes available, it will be added to the handbook, and will include Oregon’s planned 2017 Agritourism Economic Impact Analysis.

SOCIAL TRENDS THAT FAVOR AGRITOURISM

Much of what draws national and international visitors to agritourism is already strong in Oregon. Our state has a strong appreciation for good food, offers easy access to nature, and celebrates local culture. These intrinsic characteristics are the basis for authentic agritourism experiences.

Growing interest in knowing the source of food and how it is produced

- Nutrition
- Health and safety
- Environmental resiliency
- Interest in strong food systems and “buying local”

The rise of artisan production and respect for “making/makers” versus consumption

- Small-scale producers and small-batch production
- Niche products
- Value-added products
- Not limited to food

Food and travel as a cultural experience

- Slow food movement—savor each bite
- Desire to experience an “authentic sense of place”
- Especially for international travelers, experience “The West”
- Interest in interactive learning while on vacation

Technology overload

- “Unplugged” family time
- Nostalgia for traditional skills and lifestyles
- Reconnecting with nature
- See stars in the dark open skies



TOURIST ACTIVITY TRENDS

Travelers interested in agritourism share an interest in several other types of tourism. This suggests opportunities for cross-marketing and itineraries that include a mix of activities.

- Many travelers for agritourism come from a short distance away, especially in the case of rural areas close to urban areas. These travelers are often day-trippers, coming for a singular experience such as a festival, a farm-to-table dinner or a roadside stand. For travelers from farther away, agritourism is typically one of many activities they enjoy on the same trip.
- The primary audiences for agritourism are families seeking fun and educational activities, seniors, and children's groups. While visitors from across the U.S. and around the world are not uncommon, they usually don't visit agritourism sites as their primary destination, but rather tend to find out about agritourism experiences while in the area and add them to their itineraries. ([Agritourism: Cultivating Tourists on the Farm—WA State Extension](#)) There are exceptions—for example, destination ranches—but in general, attracting visitors from far away requires connecting your agritourism experience with the array of other things visitors do in your region.
- In general, local people from nearby rural areas tend not to visit local agritourism sites except when hosting family or friends from out of town—if they consider your place a “must see” activity. Locals do participate in festivals or tours especially designed for them. Harvest festivals are popular. (Also from “Agritourism: Cultivating Tourists on the Farm”)
- Agritourism that integrates active outdoor recreation is more likely to occur in non-metropolitan rural areas with natural amenities and scenic landscapes. ([Southwest Ontario Agritourism Development Strategy and Marketing Plan, 2011](#)) Multi-day itineraries that link agritourism and outdoor recreation tend to be found in similar areas.
- Across tourism sectors, long extended vacations have been replaced by short intensively active vacations, with key markets two to three hours away from a given destination. ([Agritourism and Nature Tourism in California, 2nd Edition 2011](#))
- California links nature tourism and agritourism development together, because the markets overlap and draw travelers to rural areas. Nature tourists tend to be affluent, and their numbers are growing: According to a 2006 study by the International Ecotourism Society, nature tourism grew by 20 to 30 percent annually starting in the early 1990s. Bird-watching is the fastest-growing segment of nature tourism; it is more popular than hiking, camping, fishing or hunting. (Agritourism and Nature Tourism in California)
- Canadian travelers participating in agritourism in 2007 were much more likely than other pleasure travelers to participate in wine, beer and food tasting, aboriginal cultural experiences and participatory historical activities. They also participated in outdoor activities, including wildlife viewing, ocean/lake activities, hiking, climbing and paddling. (Southwest Ontario Agritourism Strategy)
- Colorado links heritage, cultural and agritourism development together in an integrated plan. This is because nearly 75 percent of Colorado visitors include an agricultural, food or heritage activity on their trip. Of those, a third are traveling specifically for agritourism. There is also a strong connection to outdoor recreation, through a long tradition of farms and ranches hosting hunters. ([Colorado Cultural, Heritage and Agritourism Strategic Plan, 2013](#))
- National Geographic has promoted the emergence of “Geo-tourism” to capture and promote traveler preferences for destinations that protect the authenticity and geographic character of their place. Agritourism is a good fit for geo-tourists, and Oregon's Central Cascade region is already a [featured geo-tourism destination](#) in partnership with National Geographic.
- Oregon already has a strong brand for culinary tourism that is well-known internationally; culinary tourism overlaps with agritourism when the culinary activity takes place on a farm or ranch, or when it involves meeting the producer. Fifty-five percent of Oregon visitors participate in at least one culinary activity, according to the 2011 [Oregon Bounty Visitor Behavior and Attitudes Related to Oregon Products](#) report. The growth of wine trails and the wine industry here in Oregon and elsewhere is a harbinger for the potential of agritourism to benefit from interest in culinary tourism.

DEMOGRAPHIC TRENDS

Demographic trends indicate a mixed bag for agritourism.

- The market for agritourism and nature tourism industries serves primarily senior citizens and middle-age baby boomers. (Agritourism and Nature Tourism in California) This could create issues if interest in agritourism does not grow among younger generations.
- There is a trend toward grandparents traveling with grandchildren, which is an opportunity for agritourism.
- As noted above, most agritourists are day-trippers from urban areas, and they travel within a 40-mile radius at best. ([USDA 2007 Agricultural Resource Management Survey, Farm-based Recreation Report](#)) This is a sizable source of dependable customers for farm-direct sales near urban areas, even if these local customers do not “count” as tourists.
- While agritourism enthusiasts tend to be well-educated (33 percent have at least a bachelor’s degree, compared with 20 percent of the U.S. population), they have moderate income levels. This contrasts with similarly educated heritage, cultural and nature tourists, who are more affluent.
 - Oregon visitors tend to skew even more toward being highly educated: 47 percent of Oregon visitors surveyed in 2011 had at least a bachelor’s degree. (Oregon Bounty Visitor Behavior and Attitudes Related to Oregon Products, 2011)
- While there is some overlap between outdoor recreation and agritourism activities, outdoor recreation enthusiasts are younger and tend not to travel with children.
- Culinary tourists are also more affluent and younger than non-culinary tourists. ([How to Get Started in Culinary Tourism, Massachusetts Dept. of Agricultural Resources](#)) This is true by comparison to people who seek out general agritourism as well.

ECONOMIC IMPACT

The research related to spending associated with agritourism is scant, mostly old, and uses different methodologies. Because the activities are so broad-based—from stopping by a roadside stand for produce to embarking on a week-long farm-based culinary course—and because agritourism is often one of many visitor activities on a given trip, there is no typical spending amount. Below is select data that may be helpful.

- The most available data is on farm visits, primarily farm stands.
 - Tennessee, 2005 survey—The median expenditure per visitor was \$15 (product and admission/user fee). It was much higher for wine tourists, where the average expenditure was over \$25 per person. ([Visitors to Tennessee Agritourism Attractions: Demographics, Preferences, Expenditures, Projected Economic Impact](#))
 - California, 2004-2005—61 percent of respondents (residents of Yolo and Sacramento counties in CA) spent between \$5 and \$40 on a farm; 16 percent spent more than \$40.
 - Southwest Ontario, 2011—Typical visitors spent \$16-\$50 per visit.
- The Oregon Bounty 2011 research revealed that half of all Oregon tourists bought local food products, and two-thirds bought such products to take home. They spent an average of \$142 on such products.
- Connecting agritourism with heritage and cultural travelers creates more opportunities for revenue, as these travelers spend more and stay longer in a destination than other travelers. ([Exploring Authentic Oregon: The Importance of Cultural Tourism, 2006](#))

