GROWING AGRITOURISM OPPORTUNITY ON YOUR FARM

SMALL FARMS CONFERENCE
FEBRUARY 18, 2017
PRESENTIONS BY

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Alexa Carey, Travel Oregon
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Erika Polmar, Plate & Pitchfork

FACILITATED BY Melissa Fery, OSU Small Farms Program
SO YOU THINK YOU MIGHT WANT TO ADD A FARM STAY (OR OTHER TYPE OF AGRI TOURISM) VENTURE TO YOUR OPERATIONS?

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check availability or make reservation

Photo: Paul Roderick

Paco the Dusty Donkey
PRIMER - FARM STAY START-UP
(MUCH OF THIS CAN BE APPLIED TO OTHER AGRITOURISM VENTURES)

1. Regulatory
2. Legal and insurance
3. Lodging
4. Infrastructure and Amenities
5. Activities
6. Financials: Start-up
7. Financials: Operating Income
8. Marketing/Internet savvy
9. Who’s in charge?
10. Competition

Reality Check: is this a good idea?
REGULATORY

- **Farm/ranch zoning**
  - County planning dept – permits (ie, building, water, septic, public works, fire, etc)

  **Hint:** talk to your neighbors before you talk to planning. Neighbors can tank your idea fast if you don’t get them on board.

- **Lodging tax license**
  - State Department of Revenue
  - Local (city or county)?

  **Hint:** ask your local B&B
REGULATORY (CONT)

• Fictitious name registration and business entity - doing business as (DBA)

• OSHA – if you have employees

• Food handling - Dept. of Health and/or Dept of Ag

• BLM and US Forest Service – special-use permits

• Fish and Game – hunting permits
RISK MANAGEMENT - LEGAL AND INSURANCE

- Lawyer
  - Business entity
  - Terms and Conditions and Release from Liability Waivers

- Insurance
  - Business liability policy – not covered under farm policy
  - May need broker

- Limited Liability Agritourism sign (SB 341)
LODGING

• Assess your existing assets
  • Lodging and lodging potential (i.e. campsites)

• Your budget and vision will shape build-out
  • One star to five star

• Options
  • Camping
  • Glamping
  • Building
  • Existing

Image by: Willow Witt Ranch, Ashland OR
LODGING - EXAMPLES

- Rooms in your farmhouse
- Rustic cabin
- Guest house/cottage
- Platform tent
- Yurts
- Tipis
- RVs
- Converted farm building
- Campgrounds
- Mobile home
- Tree house
- Entire farmhouse
- Tiny house
- Pet and livestock facilities

Images by Abbey Road Farm in Carlton, Ore.
LODGING - LOCATION ON THE FARM

• Location – where on the farm is there room for…?
  • Guest lodging
  • Multiple units
  • Various lodging types
  • Lodging for animals and livestock?
• Proximity to activities
• Draw a site map
INFRASTRUCTURE

• Water and sewer (septic, porta potties?)

• Electricity

• Parking and road access – emergency vehicle

• RV hookups

• Cooking facilities

• Prepared campsites, or camp anywhere?

• Stalls, corrals, runs

• Fencing
AMENITIES

• New/remodeled/rustic/contemporary
• Private or communal space
• Private or shared bathrooms
• Off grid amenities – composting toilets, solar showers
• Internet/wifi/cell service/TV
• Air conditioning/heating
• Long list depending on level of ‘luxury’
ACTIVITIES OFFERED

• Helping with chores
• Cattle drives
• Riding
• Outdoor recreation
• Hunting and/or fishing
• Bird-watching
• Classes (cheese, soap, cooking, weaving)
• Depends on what you like to do and what you have time to do/potential income to make it worth your time
FINANCIALS: START-UP EXPENSES

- Lodging
- Infrastructure
- Supplies
- Legal
- Insurance
- Marketing
- Permits/Fees/Licenses
- Bedding, Furniture, Appliances, Kitchen, Bath, Décor
FINANCIALS: OPERATING REVENUES

- Revenue: nightly/weekly fee per room
  - Research local hotels, motels, B&Bs, campgrounds, hostels
  - Talk to local farm and ranch stay operators
  - Go for simple fee structure
  - Will you charge for extras (food, activities, etc.)?
  - Choose a price point – aim low to start (exceed expectations, then you can raise your price)
FINANCIALS: OPERATING EXPENSES

• Figure an average of 20-30% of revenue
• Federal tax form Schedule E - examples
  • Banking/merchant services
  • Dues/memberships
  • Food
  • Insurance
  • Housekeeping
  • Maintenance/repairs
  • Marketing/advertising
  • Supplies
  • Utilities
MARKETING

• Local, regional and state tourism agencies

• Website and social media (Facebook, Instagram, Pinterest, Twitter, YouTube)

• Online sites:
  • Niche: U.S. Farm Stay Association
  • Vacation Rental: VRBO, HomeAway, Airbnb, Hipcamp

• Contacting local news organizations

• Word-of-mouth reviews: Trip Advisor and Yelp

• Google business listing
WHO’S RESPONSIBLE?

Job description: reservations, hosting, cleaning, accounting, cooking, marketing, grounds keeping

• You

• Family member
  • Is this a paid position?

• Employee(s)

• Start-up may be different person than day-to-day
COMPETITION

Other Businesses:
• Hotels, motels, vacation rentals, AirBnB, camping sites
• Outfitters
• Parks – national and state
• Restaurants

Opportunities:
• Consider who can you co-brand with?
• Didn’t mention farms and ranches – these are your allies
REALITY CHECK: IS THIS A GOOD IDEA FOR YOUR OPERATION?

- Is the timing right?
- Do you have the time to invest in start-up?
- How long do you anticipate doing this?
  - Historically B&B hosting has limits – 5-7 years
CREATING YOUR BUSINESS PLAN

• Research the parts you don’t know
• Flesh out as you go along
• Edit/change/update
• Try out different scenarios

This is not farming.
This is hospitality.
AGGREGATING INFORMATION FOR SMALL BUSINESSES

- Hard to find all this information in one place
- Connecting across the full industry was challenging - all interested but hadn’t come together
- Industry identified a need to collaborate, connect and communicate
OREGON AGRITOURISM NETWORK
PATHWAY TO A STATEWIDE AGRITOURISM NETWORK

• OSU held two Agritourism Summits designed to bring industry together to discuss key topics

• Need identified for consistent convening to build collaborative network

• Travel Oregon assembled a core leadership team to design the goals for the network

• Travel Oregon convened several working group meetings with large groups of agritourism industry stakeholders

• Working groups and leadership team finalized six major goals
FORMATION OF THE AGRITOURISM NETWORK

• Launched in November 2015

• Convenings are held 3x per year around the state – Boardman, Roseburg, Corvallis

• Growing group of farmers, ranches, tour operators, agencies and associations

• Common goal of developing Oregon as the premier place for authentic agritourism experiences
STATEWIDE GOALS

• Inventory and assess agritourism land-use policy and regulatory framework

• Evaluate the economic impact of agricultural tourism for working landscapes

• Develop an agritourism marketing plan connected to culinary tourism

• Connect and educate young people about the state’s agricultural sector

• Connect agritourism businesses through an industry driven network

• Create standards of agritourism businesses to offer quality, authentic visitor experiences
MOVING THE NEEDLE ON STATEWIDE GOALS

- Over 150 leaders related to the agritourism industry have participated in the rotating Oregon Agritourism Network meetings.

- A comprehensive matrix and map of agritourism policies has been developed inclusive of all 36 Oregon counties.

- $65,000 out of $100,000 has been designated or raised for funding an economic impact study.

- Network is defining how to lead on being “industry driven.”

- The Oregon Agritourism Handbook and Marketing Toolkit created.
PURPOSE OF THE AGRITOURISM HANDBOOK

- Share information through one comprehensive, central resource hub
- Build a foundation and common language around standards
- Strengthen and grow quality, authentic visitor experiences
- Address gaps in information that are essential to doing business – e.g. land use policy, managing risk, and marketing
- Designed to be living document – constant updates and new information
THE OREGON AGRITOURISM HANDBOOK

• Over 82 pages of content developed by Travel Oregon staff, contractors, and action team members

• Outside resources from other agencies, states and countries

• Content includes:
  • Easy reading PDFs
  • Videos
  • Presentations
  • Research
  • Assessments

• Hosted online on industry website by Travel Oregon
HANDBOOK CONTENT

I. Why Consider Agritourism?

II. Assessing your Potential

III. Complying with Legal and Regulatory Requirements

IV. Managing Risk

V. Business Planning

VI. Marketing Toolkit

VII. Visitor Experience

VIII. Productive Partnerships

Let’s take a look!
PLANNING, POLICY & PERMITS
ACTIVITIES SUCH AS:

▪ Farm Dinners
▪ Harvest Festivals
▪ Guest Ranch/Farm Stay
▪ U Pick/U Cut
▪ Farm Stands

PERMITS FROM:

▪ Land Use Planning
▪ Health Department
▪ Fire Marshall
▪ Oregon Department of Agriculture
▪ Oregon Liquor Control Commission
LAND USE PLANNING

- Since 1973 Oregon has had a strong statewide planning program
- Statewide goals are implemented through local planning
- One size doesn’t fit all, even if you’re neighbors
- “Agritourism activity” in statute vs in practice
SENATE BILL 960

Creates processes by which county may conditionally approve agri-tourism and other commercial events or activities related to and supportive of agriculture in area zoned for exclusive farm use, including area designated as rural reserve or as urban reserve.
Adoption of ORS 215.283 (4) also known as SB 960
CALL YOUR PLANNER!

• Provide your address and/or tax lot #
• Share as many details about your business plan as possible – number of guests, parking, similar ventures
• Be patient & open to new ideas
• Ask questions, lots of them
• Think of your planner as your partner & ally
<table>
<thead>
<tr>
<th>Types of Use</th>
<th>Farm Use</th>
<th>Commercial Activities with farm use</th>
<th>Room &amp; Board</th>
<th>Mass Gathering</th>
<th>Farm Buildings</th>
<th>Farm Stand</th>
<th>Home Occupation</th>
<th>Private Park</th>
<th>Guest Ranch</th>
<th>Other commercial events</th>
<th>Wineries</th>
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# Farm Use

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<thead>
<tr>
<th>Definitions (State or County Law)</th>
<th>Types of Allowable Uses (may be subject to County review)</th>
<th>Limitations / Requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td>Farm Use (ORS 215.203)</td>
<td>Direct sales &amp; marketing</td>
<td>Limited to crops grown/harvested on site.</td>
</tr>
</tbody>
</table>
| Statute allows direct sales and direct marketing of farm crops | ● U-Pick  
● U-Cut  
● Christmas tree sales  
● Community Supported Agriculture (CSA's) | |

- **Direct sales & marketing:**
  - U-Pick
  - U-Cut
  - Christmas tree sales
  - Community Supported Agriculture (CSA's)
## Farm Stands

<table>
<thead>
<tr>
<th>Definitions (State or County Law)</th>
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<tbody>
<tr>
<td><strong>Farm Stands</strong> (ORS 215.283(1)(o)) (OAR 660-033-0130(23))</td>
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Farm Stands (cont)

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<thead>
<tr>
<th>Types of Allowable Uses</th>
<th>Limitations / Requirements</th>
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<tbody>
<tr>
<td>Direct sales of farm crops and livestock produced on the farm or other farms in Oregon and retail incidental items.</td>
<td>Specifically does not include temporary or permanent structures:</td>
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<tr>
<td>“Fee based activity to promote the sale of farm crops sold at the farm stand…” could potentially include a variety of uses, as follows (based on recent Bella Organics Ct. of Appeals case):</td>
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<td>● small-scale gatherings (birthdays, picnics)</td>
<td>● designed for occupancy as a residence or for activity other than the sale of farm crops or livestock</td>
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<td>● corn mazes</td>
<td>● for banquets, public gatherings and public entertainment</td>
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<td>● school tours</td>
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<td>● pumpkin patch rides</td>
<td>Annual sales of incidental items and fees from promotional activities limited to 25% of total annual farm stand retail sales.</td>
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<td>● hayrides</td>
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<td>● farm animal exhibits</td>
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<td>● farm product food contests and food preparation demonstrations</td>
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<td>● farm to fork dinners (outdoors)</td>
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</table>
Agri-tourism key provisions

“agri-tourism and other commercial events and activities related to and supportive of agriculture”

- Established by Senate Bill 960 in 2011
- Counties can choose to adopt these regulations, in whole or in part.
- Must be “incidental and subordinate to existing farm use.”
- Different approvals for the different levels or intensities of events, increasing as the intensity of events increases.
  - a single event license
  - land use permits
    - for a single event
    - up to 6 events
    - up to 18 events
- Required impact findings that the use will not:
  - force a significant change in accepted farm and forest practices on surrounding lands
  - significantly increase the cost of accepted farm and forest practices on surrounding lands
Types of Allowable Uses

Statute is not clear about the types of events and activities that might be allowed.

Possibilities could include activities related to:
- Education
- Entertainment
- Hospitality
- Outdoor recreational

More specific activities might be:
- Cooking classes using farm products
- School tours
- Farm / Garden / Nursery tours and stays
- Festivals / Harvest days
- Pony rides / Petting zoo / Corn maze / Pumpkin patch and catapult contest
- Musical events
- Farm-to-table dinners
| Agri-tourism / Commercial Events or Activities (ORS 215.283(4)) | State law does not specifically define the term “Agri-tourism” or specific activities and events that could be considered agri-tourism.

Customary Definition is: Any commercial enterprise at a working farm or ranch conducted for the enjoyment of visitors that generates supplemental income for the owner.

The regulations apply to “agri-tourism and other commercial events and activities related to and supportive of agriculture.” |

Definitions (State or County Law)
<table>
<thead>
<tr>
<th>Limitations / Requirements</th>
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<tbody>
<tr>
<td>State law requires that the activities and events must be “related to and supportive of agriculture” and be “incidental and subordinate to existing farm use.”</td>
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</tbody>
</table>

State law provides for:
- 1 event expedited license
- 1 event land use permit
- up to 6 events land use permit
- up to 18 events land use permit

All are subject to conditions set by the local jurisdiction, such as:
- Parking
- Noise
- Sanitation
- Signage
- etc.

No limitation on annual sales to farm income
## Wineries

<table>
<thead>
<tr>
<th>Wineries</th>
<th>Definitions (State or County Law)</th>
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</table>
| ORS 215.452 (smaller wineries) ORS 215.453 (large wineries) | Small Winery  
- Less than 50,000 gallons on at least 15 acres  
- More than 50,000 gallons on at least 40 acres  
Large Winery  
- At least 150,000 gallons on 80 acres or more  
“Agri-tourism or other commercial events” in conjunction with wineries includes:  
- Outdoor concerts for which admission is charged  
- Educational, cultural, health or lifestyle events  
- Facility rentals  
- Celebratory gatherings  
- Other events  

The promotion of wine produced in conjunction with the winery is a secondary purpose of the event.
## Wineries

<table>
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<tr>
<th>Types of Allowable Uses</th>
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Operations that are directly related to the sale or marketing of wine produced in conjunction with the winery -- (Includes limited service restaurants and sale of incidental items directly related to onsite wine sales).

2011 and 2013 legislation added allowances for:
- Agri-tourism or other commercial events
- Charitable activities for which the winery does not charge a facility rental fee
- Clarified food/beverage provisions associated with B&B’s at wineries

Winery activities may include:
- Wine Tour / Tasting
- Wine club meetings
- Winemaker luncheons/dinners
- Business activities for wine industry professionals
- Open Houses to promote wine
- B&B / Room & Board facilities
- Educational, health, lifestyle events
Wineries

Limitations / Requirements

Agritourism/commercial event/charitable activities are allowed:
- up to 18 days per year for smaller wineries
  - 1 - 6 days not a land use decision
  - 7-18 days land use permit
- up to 25 days per year for larger wineries (restaurants may be 25+ days)
  - land use permit is required

Both 7-18 and over 25 day applications must address potential impacts and must:
- Be subordinate to the production and sale of wine
- Not create significant adverse impacts to uses on surrounding land

Income from limited service restaurants and sale of incidental items must not exceed 25% of income from wine sales.
Outdoor Mass Gatherings

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<thead>
<tr>
<th>Outdoor Mass Gatherings ORS 433.735(1) ORS 433.750 ORS 433.755 ORS 433.763(1) OAR 660-033-0130(33) OAR 660-033-0130(34)</th>
<th>Definitions (State or County Law)</th>
</tr>
</thead>
<tbody>
<tr>
<td>State statute defines “outdoor mass gatherings” to mean an anticipated assembly of more than 3,000 persons which continues or can reasonably be expected to continue for more than 24 consecutive hours but less than 120 hours within any three month period. Other gatherings are an assembly of 3,000 or fewer persons not anticipated to continue for more than 120 hours in any three month period. Counties are allowed to make modifications to this definition (e.g., “large gatherings” in Marion County)</td>
<td></td>
</tr>
</tbody>
</table>
## Outdoor Mass Gatherings (cont)

<table>
<thead>
<tr>
<th>Types of Allowable Uses</th>
<th>Limitations / Requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td>● Concerts</td>
<td>● Mass Gatherings ○ Subject to review by the Planning Commission</td>
</tr>
<tr>
<td>● Festivals</td>
<td>■ Demonstrate compatibility with existing land uses</td>
</tr>
<tr>
<td>● Fairs</td>
<td>■ Not materially alter stability of land use pattern of the area</td>
</tr>
<tr>
<td>● Carnivals</td>
<td>■ No permanent structures are allowed</td>
</tr>
</tbody>
</table>
|                         | ● Small or “Other” Gatherings ○ Not subject to review (e.g. not a “land use decision”)

*Agri-tourism and other commercial events or activities may not be permitted as mass gatherings under 215.283(4) ~ however they are being permitted this way in some counties.*
AGRITOURISM COMES IN MANY FORMS

Photo credit: Paul Deatherage, Leaping Lamb Farm
Month-long spring festival – attracts over 100,000 people
FRUIT AND FARM LOOPS
HOOD RIVER, CANBY, FARMLANDIA, MOLALLA OR

Farms, wineries, country events – all tied together
E.Z. ORCHARD’S HARVESTFEST
SALEM OR

ABOUT

October is Harvestfest month at E.Z. Orchards. Started in 1996 as a way to bring people into closer contact with the fields, orchards and animals of E.Z. Orchards, we are still providing that "real contact" with the farm. Through the years we have added more and more features to our farm for you to experience.

Pumpkin Patch, Corn Maze, Hay Rides and more
Educational tours: chefs to fiber enthusiasts, producer groups to car clubs
ALPACAS AT MARQUAM HILL RANCH
MARQUAM OR

Breeders first but promote with a store, tours, even a farm dinner
Company that books farm and ranch locations for farm-to-table events
FAIRFIELD FARM
CORVALLIS OR

U-pick Tilth certified organic strawberries. Also grows garlic and blueberries.
Welcome to Willow-Witt Ranch

Willow-Witt Ranch is a 445-acre gem in Southern Oregon’s high country. In this magical valley, owners Suzanne Willow and Lanita Witt have restored a working forest and wetland, and a small farm with exciting Farm Stay accommodations. Here, you can enjoy a memorable stay and experience nature’s beauty on a ranch committed to land conservation and restoration, alternative energy and sustainable agriculture.

Stay With Us  Special Events  Farm Goods

Stay with us
Our Farm Stays allow families to experience life on a farm, a healthy varied forest, and a healing wetland. A stay in our Meadow House, Farmhouse Studio, a Furnished Wall Tent, or your own tent in our forested campground invites you to relax into the rhythm of nature. Hear the wind, breathe in fresh air, drink pure spring water, and taste the difference in food you pick fresh from the garden. Watch stars in a truly dark sky, hike through meadows of wildflowers and forests filled with birds and wildlife, and spend time with contented animals as you connect with your family and the

Farm stay (house, studio, platform tents, campsites),
sell at farmers’ market, special events, workshops
GATHERING TOGETHER FARM
PHILOMATH OR

Shopping at GTF

Our Farmstand features the diverse array of fine organic produce grown here on the farm and offers much more than your average roadside produce stand.

We have great pastries and breads baked fresh every day. Our organic potato doughnuts are made from scratch each morning, something seldom found in the doughnut world.

Not only will you find our beautiful produce and pastries for sale at our Farmstand, you’ll also find Cattail Creek Lamb, Afton Field Farm free-range chicken, Wild Harvest Honey, local free-range eggs, Sweet Creek Foods fruit spreads and pickles, and a whole lot more! Everything we sell here comes from our farm or from other local producers.

Catering

Having a special celebration or event? We’d love to help you feed your guests!

Large market farm with on-farm restaurant, farm stand, and catering
WE ALL HAVE DIFFERENT MOTIVATIONS

• Financial
  • 92% in USFSA survey cited this
  • If not making money, can you afford to do this?

• Educational
  • 67% in USFSA survey cited this

• Meeting people from all over
  • 52% of USFSA survey cited this

• Other
OUR CONNECTEDNESS GIVES US A VOICE AS OUR STATE’S AGRITOURISM SECTOR

Farm Stay U.S. Mapped Results of Oregon Farm and Ranch Stays – As an Example (www.Farmstayus.com)
CONNECT WITH US, CONNECT WITH OTHER FARMS, STAY AND GET INVOLVED
...AND PUT YOUR CONTACT INFO ON THAT CLIPBOARD WE ARE SENDING AROUND

So we can stay in touch.
THANK YOU!
...AND QUESTIONS?

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