Research, Engagement, Action Plan to Support & Foster Continued Development of Agritourism in the Community Futures Wild Rose Region

Phase I: Agritourism Research - Report

FINAL

Prepared for:
Community Futures Wild Rose

Researched and Prepared by:
ClearThink™ Group

March 12, 2019

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Preamble

Please find the results of the Phase I Agritourism Research, which is part of a multi-phased project for "Research, Engagement, Action Plan to Support & Foster Continued Development of Agritourism in the Community Futures Wild Rose Region."

The purpose of this phase of the project is to gather and understand available research in the agritourism sector and determine how it can apply to the Community Futures Wild Rose Region.

This report should be read in its entirety for full understanding of the information presented.

The report is divided into five sections plus an appendix:

- Goal of the Project
- Project Overview
- Methodology, Phase I
- Summary of Findings from the Research
- Conclusions and Next Steps

Acknowledgements

This project has been made possible through the Tourism Growth Innovation Fund from the Government of Alberta and in partnership with financial contributions from Community Futures Wild Rose, Wheatland County, Kneehill County and Rocky View County.

We have also received multiple letters of support from Whispering Cedars Ranch, Strathmore Chamber of Commerce, Wheatland County, Poplar Bluff Organics, and more.

Clearthink™ Group and *Factor 5 Group* team members would like to express their sincere gratitude and appreciation to the numerous individuals, communities and organizations who were contacted and contributed their time, ideas and opinions, throughout the course of this research.

Project Stakeholders

Table of Contents

1. Goal of the Project

The goal of the project: "Research, Engagement and Action Plan to Support and Foster Continued Development of Agritourism in the Community Futures Wild Rose Region in Alberta".

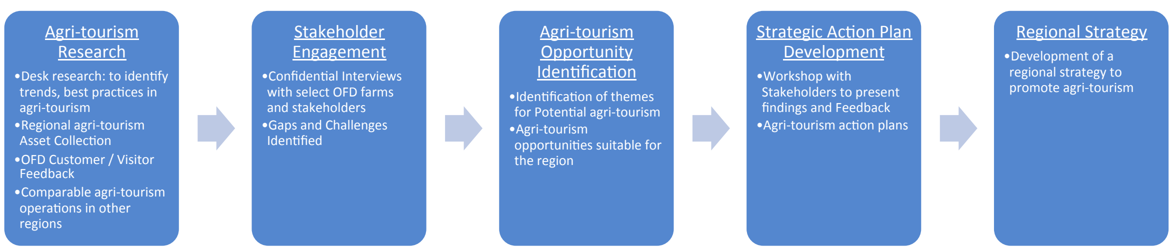
2. Project Overview

The illustration below outlines the phased approach followed for the project which documents, understands and facilitates the growth of agritourism in the region.

3. Methodology; Phase I

Phase I: Agritourism Research

Research, Engagement, and Action Plan to support and foster continued development of Agri-tourism in Wildrose Region



Task 1: Project Start-up/Kick-off Meeting with Steering Committee

The consulting team and Steering Committee met to clarify the project goals, determine important milestones and exchange relevant materials.

Task 2: High-level Scan to Identify Trends, Best Practices in Agritourism

A high-level scan was undertaken to map out an overview of the sector including secondary research and in-depth interviews with sector experts.

Task 3: Regional Agritourism Asset Collection
Creation of a regional database of agritourism assets. Agritourism businesses would be defined as those businesses that are growers / producers of food and who have an agritourism focus, such as: farms, ranches, greenhouses, you-picks, orchards, brewery/wine/mead, apiaries and culinary.

The asset database includes information such as: business / organization name, contact information and business description. The database is in excel format and can be updated and formatted as required.

Task 4: Visitor Feedback and Insights
Feedback was collected from visitors to the farms during the Open Farm Days event in August 2018. A question guide was developed and given to six surveyors who went to selected farms in the Community Futures Wild Rose region during the two days of Open Farm Days, August 18 and 19. Over 180 surveys were collected during the weekend and entered into a survey research platform for analysis. Additionally, postal codes were collected and submitted to the Government of Alberta's PRIZM platform to understand more about the types of visitors to farms in the region. The question guide used by the surveyors is included in the appendix.

Task 5: In-Depth Interviews with Selected Comparable Agritourism Operations
A list of approximately ten agritourism operators/owners was identified through knowledge of the study team and from suggestions of the operators themselves. A question guide was developed to use during in-depth telephone interviews with existing agritourism operators in Alberta, Ontario, Quebec, Pennsylvania and California. A total of five in-depth interviews were completed. The question guide is included in the appendix.

We reached out to the following agritourism operations:
- Prairie Gardens, Alberta
- Kraay Family Farm, Alberta
- Kayben Farms / Sunshine Adventure Park, Alberta
- The Saskatoon Farm, Alberta
- The Jungle Farm, Alberta
- Quinn Farm, Quebec
- Saunders Farm, Ontario
- Boundary Ranch, Alberta
- Cherry Crest Adventure Farm, Pennsylvania
- Underwood Family Farm, California

Task 6: Analysis and Synthesis of Findings and Reporting
The information collected in the above tasks have been analyzed and developed into findings, conclusions and next steps.

4. Summary of Findings from the Research

The following section presents a summary of top findings from the recent research conducted.

The Future of Tourism in Canada

From a recently released report from Destination Canada, “Unlocking the Potential of Canada’s Visitor Economy,” tourism is one of Canada’s largest economic drivers. In 2017, tourism generated $98 billion in revenues and accounted for 2% of Canada’s GDP. The sector contributed an estimated $27 billion in tax revenues across all levels of government in 2017. However, the report stated Canada’s tourism potential remains significantly underdeveloped. Growth in Canadian tourism has lagged behind global growth for three of the last four years. This is due to several challenges: concentrated demand, limited transportation options, labour shortages and lack of attractive investments. Addressing these issues will require a new approach to coordinating the efforts of all levels of government and all sizes of tourism operators. Action is required.[1]

Agritourism is a subset of tourism which merges elements of two complex industries—agriculture and travel/tourism, with the potential to open up new, profitable markets for farm products and services and provide travel experience for a large regional market [2]

We will examine agritourism’s potential more fully in the following sections.

Agritourism Definition

There is presently no standard definition of agritourism, nor is there consensus on the types of activities that represent agritourism *(Carpio, Wohlgenant & Boonsaeng, 2008; Fleischer & Tchetchik, 2005; McGehee & Kim, 2004; Nickerson et al., 2001; Phillip, Hunter & Blackstock, 2010; Schilling, Marxen, Heinrich & Brooks, 2006; Tew & Barbieri, 2012; Veeck, Che & Veeck, 2006)*. Almost 20 years ago, Busby and Rendle (2000) identified 13 definitions of agri- tourism in the literature. Some of the terms include: farm tourism, agritourism, agritainment, agricultural tourism, rural tourism, ag-tourism.

The following outlines some of the definitions around agritourism:

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[1] Destination Canada, Unlocking the Potential of Canada’s Visitor Economy, December 2018, https://www.destinationcanada.com/en/news/unlocking-the-potential-of-canadas-visitor-economy.

[2] Indiana Business Review, Agritourism and Rural Economic Development, 2016, http://www.ibrc.indiana.edu/ibr/2006/fall/article3.html

- **Wikipedia:** Agritourism or agrotourism, as it is defined most broadly, involves any agriculturally based operation or activity that brings visitors to a farm or ranch. Agritourism has different definitions in different parts of the world, and sometimes refers specifically to farm stays as in Italy. Elsewhere, agritourism includes a wide variety of activities, including buying produce direct from a farm stand, navigating a corn maze, slopping hogs, picking fruit, feeding animals, or staying at a bed and breakfast (B&B) on a farm. Agritourism is a form of niche tourism that is considered a growth industry in many parts of the world, including Australia, Canada, the United States, and the Philippines. https://en.wikipedia.org/wiki/Agritourism

- In the 2010 Report, *"A Profile of Canadian Agri-tourists and the Benefits They Seek"* conducted out of the University of Waterloo, *"Rural Tourism*" is used as an umbrella term which includes five types of tourism: *Agri-tourism, Heritage Tourism, Nature Tourism, Rural Sports Tourism* and *Adventure Tourism.* The Waterloo study defines agri-tourism as "the act of visiting a working farm or any agricultural, horticultural, or agri-business operation for enjoyment, education or active involvement in the activities of the farm or operation." http://www.investkelowna.com/application/files/2114/7795/4795/agriculture_to_agri-tourism_revised2016-01-21.pdf

- Agritourism is a subset of a larger recreational industry called rural tourism that includes visits to rural settings or rural environments to participate in or experience activities, events or attractions not readily available in urbanized areas. http://www.omafra.gov.on.ca/english/busdev/facts/16-029.htm

- **Government of Alberta's Department of Culture and Tourism's** unofficially uses the term "ag-tourism" and defines it as "nearly any activity in which a visitor to the farm or other agricultural setting contemplates the farm landscape or participates in an agricultural process for recreation or leisure purposes". Tew & Barbieri, 2012.

- **Government of Alberta's Department of Agriculture and Forestry**, ag tourism is "the marriage between two of Alberta's top industries – agriculture and tourism. It presents the consumer or tourist with an opportunity to engage in a direct exchange of values between themselves and the farm community – whether it is at a farmers' market, on a farm tour, at an agriculture festival or fair, or at a country vacation farm or market garden". Ag tourism is a collection of ag-based attractions, events and services:
  - Attractions
  - Heritage farms and ranches
  - Farm recreation and visits
  - Ag industry tours
  - Events
  - Festivals
  - Fairs
  - Rodeos

- **Alberta Agriculture and Forestry** further explains cluster development as a group of like-minded stakeholders and operators who come together to increase the profile for their operations and geographic area, along an ag tourism theme. Cluster development is an internationally recognized economic development process. We know that the ag tourism industry in Alberta can benefit from this process by using agriculture as a theme to link dispersed operators. Through cluster partnerships ag tourism operators can: access new markets, boost profile and awareness, and increase the overall appeal and draw to a region - ultimately resulting in increased profits.
  http://www1.agric.gov.ab.ca/$department/deptdocs.nsf/all/explore14621

Because of the wide variety of terms and definitions and for the purposes of this project we will use the term ***agritourism***, as this term seems to have the widest application. It has to be kept in mind additional education and communication may be required to ensure the stakeholder groups and consumers understand the terms and expectations. As we progress through the phases of this research project, we will define the essence of agritourism for the region of Community Futures Wild Rose.

Current State of Agritourism

Agritourism can be thought of as a form of enterprise diversification for farms. Incorporating agritourism as an alternative enterprise has the potential to contribute to agricultural sustainability, broaden farmers' economic base, provide educational opportunities to tourists, and engender a strong communal cohesion (Ilbery and Bowler, 1998). Beus (2008) describes agritourism as a possible strategy for many U.S. farmers to expand their incomes and stay in business. This practice, referred to as the "cultivation of tourists on the farm in addition to crops" is already well established in countries like Switzerland, Italy, New Zealand and other European countries.
http://www.academicjournals.org/journal/JAERD/article-full-text-pdf/DE623AF63872

The U.S. Census of Agriculture clearly shows an increasing trend in agritourism and related recreational services. In 2012, agritourism operations numbered 33,161 with $704 million in sales. Farms with gross farm receipts of $25,000 or more, increased from 3,637 farms in 2007 to 4,518 in 2012. This strongly suggests that the rural United States is a popular tourist destination.
https://www.agmrc.org/commodities-products/agritourism/agritourism-profile

Percentage of Income from Agritourism in the US

The table below shows some statistics from selected US states and income derived from agritourism.

State	Percentage of Farms Participating in Agritourism	Total Agritourism Income (USD)	Agritourism Income per Farm (USD)	Average Gross Income per Farm (USD)	Percentage of Total Income from Agritourism
Vermont	33%	$19.5M	$8,864	$71,970	12%
Hawaii	3%	$33.9M	$181,283	$99,882	181%
New York	5%	$25.7M	$12,347	$80,687	15%

Source: New England Ag Statistics Service, 2002; Agritourism Profile, AgMRC, 2003; New York State Agritourism Business Study, Community Food and Agriculture Program, 1999; USDA ERS Agricultural Resource Marketing Survey, 2004. https://www.agmrc.org/media/cms/Mace_BA47806FF3EE2.pdf

Agritourism in the province of Quebec

A study conducted by Chaire de Tourisme Transat ESG UQAM on Agritourism Devleopment in Quebec, March 31, 2018 gave an overview of agritourism in that province. Stating as there was little Canadian data available on agritourism; they relied on a study by Lemay Stratégies: *Retombées économiques et importance touristique de l'agrotourisme et du tourisme gourmand*, September 2016. In 2016, Lemay Stratégies published the results of a survey on the economic benefits and importance of agritourism and gourmet tourism in Québec for towns with fewer than 15,000 inhabitants. The results show that the majority, or 75%, of agritourism and gourmet tourism companies have grown over the last five years, and this trend will continue for the next five years. The following bullets provide some statistics on agritourism and gourmet tourism in Québec by Lemay Stratégies.

- Type of operations

Fruit and vegetable farms make up the greatest share (46%) of agritourism and gourmet tourism businesses, followed by alcohol producers (32%). For gourmet tourism businesses alone (excluding agritourism), catering is in first place with 31%, followed by food product processors with 25%.

- Activities and services

The vast majority of companies sell their products on-site (73%), with many also offering on-site recreational or educational activities (52%). More than half (59%) of gourmet tourism companies both sell their products and provide catering services.

- Number of visitors

Agritourism and gourmet tourism businesses received 26 million visits in 2015, representing an average of 14,000 visitors per year for each of the 789 agritourism farms and 1,052 gourmet tourism operators. The majority (57%) of businesses say summer (July to September) is their busiest season. Local clients and those from the surrounding area make up most of the traffic for agritourism and gourmet tourism businesses. Visitors from the rest of Québec make up one-third of the visitors, and the remainder (11%) come from outside the province.

- Revenue

Agritourism and gourmet tourism activities are a significant source of revenue, accounting for approximately 52% of the companies' total sales figure and generating a total of $485 million in 2015.

Open Farm Days in Alberta
In Alberta, over 100 host farms registered to participate in the Open Farm Days event for 2018, https://albertafarmdays.ca. During its sixth year, Open Farm Days attracted some 20,000 person visits and $189,000 in on farm sales. Statistics from the Alberta OFD coaching program, started in 2015, also shows a general increase in visitation and expenditures to the farms. The OFD event is a great way for farm operators to "test drive" agritourism on their site and evaluate its performance and the alignment within their overall business model.

Best Practises in Agritourism

Many farmers who start agritourism enterprises undervalue their products and services, perhaps in part from not knowing their new consumer base, but also from perpetuating the lowest-price mentality dominating modern agriculture (Brookfield & Parsons, 2007; Essex et al., 2005). Perhaps this comes from the commodity based thinking in agriculture over many years.

Undertaking more in-depth market research specific to agritourism would provide farmers with information and knowledge about visitors. This information and knowledge could inform agritourism operators of the scope of products, services, and experiences that agritourists desire and seek and better assess the potential and willingness of agritourists to pay for those benefits.http://journals.brandonu.ca/jrcd/article/view/359/90 "A Profile of Canadian Agritourists and the Benefits They Seek."

From the same study:
- Agritourism is growing as a niche market because it meets the needs of modern Canadian families. Farms are increasingly becoming attractive tourist destinations because visitors are nostalgic for a simpler time (Che, Veeck & Veeck, 2005; Timothy, 2005).
- They want to escape the hustle of the city, connect with their cultural heritage, be with family, be in a natural environment, and enjoy a richer and authentic leisure experience (Che et al., 2005; Experience Renewal Solutions, 2009; Kline et al., 2007; Oh & Schuett, 2010; Roberts & Hall, 2001; Sznajder et al., 2009).
- Increasingly, as food production and distribution become of greater public concern, families want their children to know where their food comes from (Sznajder et al., 2009; Veeck et al., 2006), and related concerns over food sovereignty have increased public interest in experiencing the farm (Che et al., 2005; Veeck et al.,2006).

Understanding the expectations of agritourists, that is, the benefits they seek, is critical to ensuring the success of agritourism as a diversification strategy to keep the family farm viable (Haugen & Vik, 2008; Wilson, 2007). However, very little research has been undertaken to understand who visits agritourism enterprises in Canada. Market segmentation suggests that product development should go hand in hand with having a clear understanding of consumers and the benefits they seek so that products, services, and messages meet and, proprietors hope, exceed expectations (Cook et al., 2006; Middleton & Clarke, 2000).

The lack of market research into Canadian agritourists has resulted in farmers‘ choosing to diversify into tourism based on being told of or observing the success of other farmers who have started agritourism enterprises rather than on solid market research (Roberts & Hall, 2001; Williams et al., 2004). With appropriate knowledge of the market, diversification into agritourism has the potential to add income to the farm family‘s household (McGehee & Kim, 2004; Nickerson, Black, & McCool, 2001; Williams et al., 2004). However, more so than the desire to increase economic returns, farm families may be diversifying into agritourism because of the effects of globalization on agriculture, the growth of tourism, and social motivations, such as choosing to maintain a rural lifestyle (Haugen & Vik, 2008; Ollenburg, 2006; Wilson, 2007). A leading expert on agritourism marketing, Eckert (2004) captures the essence of agritourism for the family farm as, *"... the opportunity to keep the family farm alive by creating new revenue streams and a way to keep the younger generation involved through creating new business roles and challenges."*

From the Agritourism courses offered at Rutgers Cooperative Extension, agritourism includes a wide range of activities:

- On-farm sales of agricultural products (direct-to-consumer) (E.g., farm markets, pick-your-own operations)
- Educational (E.g., School tours, winery tours, farm work experiences)
- Entertainment (E.g., Hay rides, corn mazes, petting zoos, haunted barns)
- Accommodations (E.g., on-farm bed & breakfasts, farm picnics)
- Outdoor recreation (E.g., Horseback riding, hunting, fishing, bird watching)

Rutgers has also outlined some very effective agritourism enterprise category types across a continuum:

- **Supplementary enterprise:** Agritourism as a minor activity that supports other products on the farm. For example: if the primary enterprise is livestock production, inviting school groups to the farm several days out of the year to learn about animals and farming could supplement income.
- **Complementary enterprise:** Agritourism activities share equal footing with other enterprises in the farm's product mix. For example: an apple production enterprise on the farm. By selling half of the apples to a wholesaler and the remainder to "pick-your-own" guests, the two enterprises (wholesale & direct market) would be complementary.

- **Primary enterprise**: Agritourism as the dominant/primary activity on the farm. For example: opening a cottage brewery on the farm and inviting guests to spend the day or weekend tasting beer. The beer tasting package may include overnight lodging in a cottage on the property. It may also involve growing the barley and the hops for the beer produced on the farm to supplement the beer tasting activities.

Supporting Agritourism Trends

There are several trends noted in the market that bodes well for the ongoing development of agritourism.

The study by Chaire de Tourisme Transat ESG UQAM on Agritourism Development in Quebec, March 31, 2018, identified the following consumer traits supporting the growth of agritourism.

- Environmentally, socially aware and responsible
  Consumers are increasingly concerned with reducing their negative environmental impact. When they travel, they consciously seek out more responsible vacations and activities, and want to do business with tourism companies that offer sustainable and environmentally friendly options.
- Health conscious
  Consumers' increased focus on healthy eating is driving the restaurant industry to adapt to this trend. Healthy food is now available almost everywhere. Chefs are becoming known for designing menus and experiences around using local ingredients.

- Interested in having authentic experiences
  Consumer expectations now centre on having authentic travel experiences. People no longer consume in order to "have", but rather to "be", and place greater emphasis on enjoyment rather than ownership. Increasingly accustomed to having fabulous travel experiences. Today's travellers expect ever greater thrills that stimulate all their senses, forcing tourism companies to offer meaningful emotional experiences in order to develop long-term relationships with them.

- Canada's Food Guide
  In addition to the trends identified in the Quebec study above, the recent update to Canada's Food Guide focuses on educating consumers about healthy eating patterns and the importance of eating more fresh fruits and vegetables and plant-based proteins, which is hoped to encourage consumers to look at eating and preparing local (fresh) foods more often. https://food-guide.canada.ca/en/

- Clustering is Important
  According to the recent study supported by Destination Canada, December 2018, "Unlocking the Potential of Canada's Visitor Economy", an industry cluster is, in the words

of Harvard Business School professor Michael Porter, "a geographically close group of interconnected companies, suppliers, service providers, and associated institutions in a particular field." The companies and other organizations in a cluster work together in a mutually reinforcing way that creates more than the sum of their parts. In the visitor economy, clusters bring together accommodation, food and beverage, entertainment and attractions with operators and travel agencies, guides, crafts, car rentals and transport, and are supported by education and training, convention centres, consultancy and other business services.

Research shows tourists today want to have authentic experiences when travelling and visiting - agritourism is an option that aligns well with their goals. Agritourism can provide agricultural operators and communities with many benefits. With planning, collaboration and clustering, agritourism is a platform where farmers can tell their story (educate), diversify product offerings, build customer loyalty and widen their revenue streams. Rural communities are also positioned to support the agritourism clustering effect with their offerings of needed assets and services.

Economic Impact of Agritourism

Very little research has been done on the economic impact of agritourism but a few stats do come out. Economic spin offs from agritourism can include: new employment opportunities and an expanded tax base for a region and a study in Poland suggested the average income from agritourism accounted for about one-third of the overall household income of farmers.

Agritourism in the state of Virginia had a $2.2 billion economic impact in 2015, according to a study by the Virginia Tech Pamplin College of Business. http://www.virginiabusiness.com/news/article/the-economic-impact-of-agritourism. The report considered spending by visitors at 1,400 agritourism businesses in Virginia, including wineries, ranches, historical attractions and pick-your-own vegetables and fruit farms. The report states more than one-third (35%) of the respondents had been open less than five years. Agritourism also is important in attracting out-of-town visitors. The study mentions out of 7.2 million visitors, 3.2 million had traveled from farther than 50 miles to visit the sites surveyed.

Key findings suggest that in 2015, agritourism in Virginia:

- Supported 22,000 jobs
- Contributed $840 million (USD) in income
- Paid $135 million (USD) in state and local taxes

Future of Agritourism

Thoughtful development of agritourism may very well promote employment, generate additional revenue, promote sustainable stability in rural communities and also contribute to a well-managed cultural landscape.

Another benefit of agritourism is the importance of clustering. While in many business sectors businesses often seek to stand out from competitors, agritourism thrives on “clustering” area attractions together in efforts to bring in customers / tourists. In order for agritourism operators to get visitors coming in, the farm and the region needs to promote as a destination and a cluster. Part of the education and challenge is to help producers transition from a production-oriented enterprise to a hospitality and service-based enterprise.

We will explore the future of agritourism further in Phase II as we collect more data.

Regional Agritourism Asset Collection

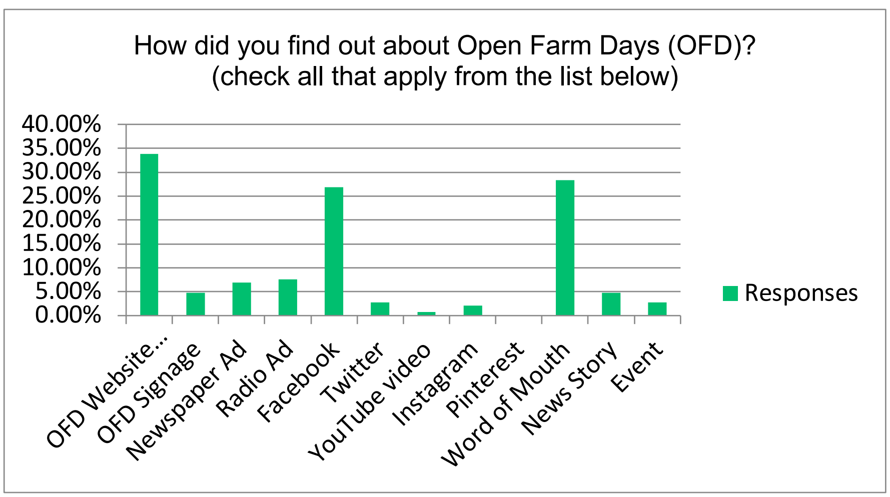
A database of regional agritourism assets is being developed for those businesses and organizations within the CFWR region. The database is being developed as a separate document in Excel and will be sortable, format-able and update-able.

Profile of Alberta Open Farm Days Visitors to the Region, 2018

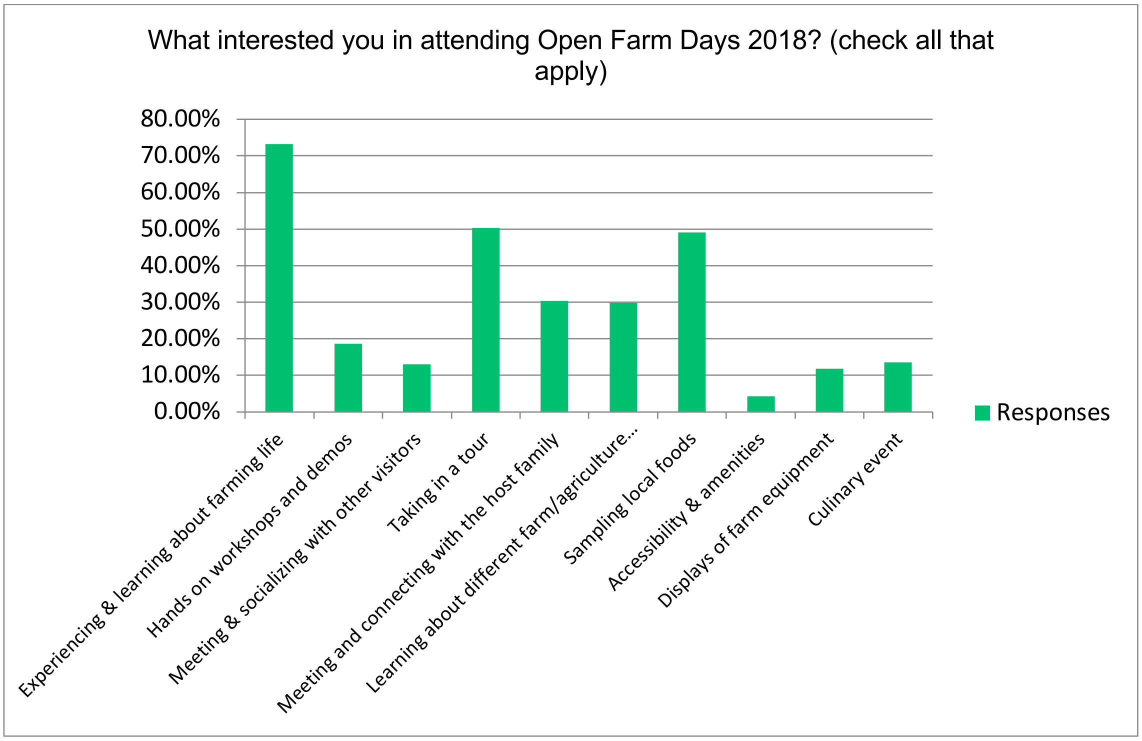
This project used the 2018 Alberta Open Farm Days event in the province as a way to connect with visitors going to farms in the Community Futures Wild Rose region on August 18 and 19. Surveyors were deployed to visit selected farms over the two days armed with a questionnaire. Visitors were approached and asked to participate in the survey to help the project team understand more about the participating visitor's perspective on agritourism. Respondents were told their feedback would be kept confidential and only reported in aggregate form. Over 180 surveys were collected during the weekend and entered into a survey research platform for analysis. In addition, 417 postal codes were collected and submitted to Alberta Culture and Tourism to deploy the licensed Environic's PRIZM platform to understand more about the types of visitors to farms in the region.

Results from the 182 OFD respondents:

- For 72% of the respondents, this was their first OFD experience, 28% had participated in the past.
- The top three ways visitors found out about OFD was (as respondents could choose more than one answer, percentages add up to more than 100%): OFD Website (34%), Word of Mouth (28%) and Facebook (27%). Together these three methods total 89%, which is very significant as to how visitors are learning about OFD. Other modes include: radio ad (8%), newspaper ad (7%), OFD signage (5%), News story (%5), Twitter (3%).



- What interested visitors in attending OFD (as respondents could choose more than one answer, percentages add up to more than 100%): experiencing and learning about farming life (73%), taking a tour (50%), sampling local foods (49%) were the top three answers followed by meeting and connecting with the host family (30%), learning about different farm/agriculture operations & technologies (30%), hands on workshops and demos (19%), culinary event (14%), meeting & socializing with other visitors (13%), displays of farm equipment (12%) and accessibility and amenities (4%).



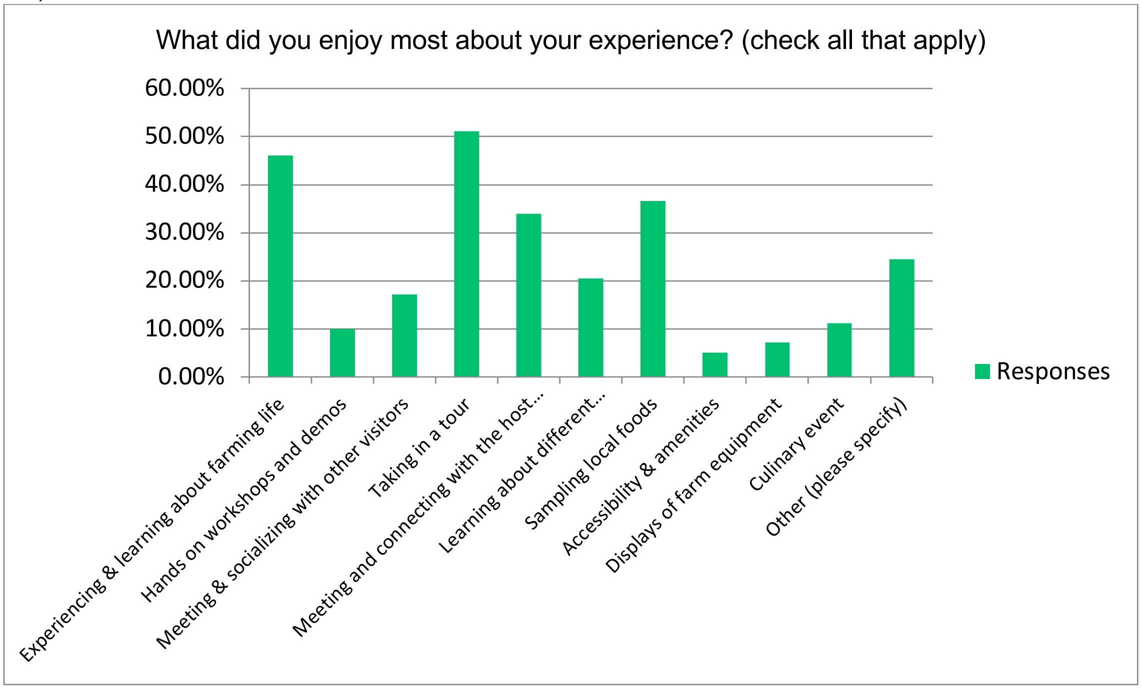
- Visitors planned their route by OFD website (51%), OFD signage along the route (13%), Google maps (12%) and Community Futures Wild Rose Guide (3%).

- Most visitors planned on visiting one farm on OFD weekend (54%). 21% plan on visiting 2 farms, 12% will visit 3 farms, 7% will visit 4 farms, 3% will visit 5 farms.

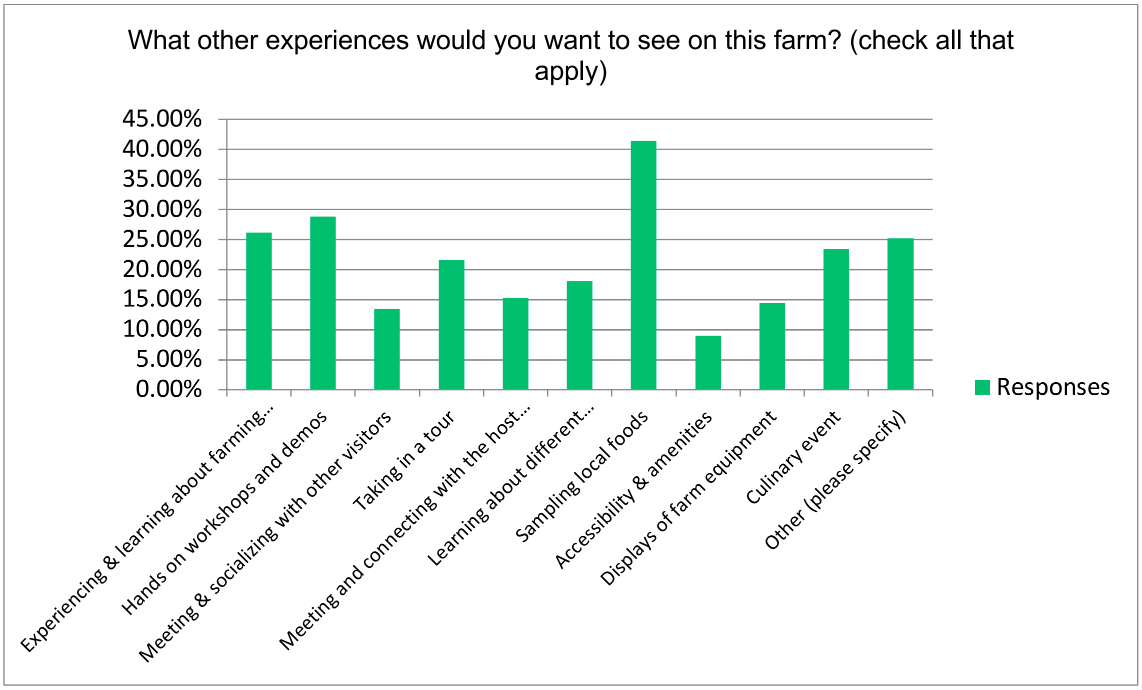
- 60% of the visitors spend *more* than one hour at the farms they visited. 36% spent between 30 minutes and 1 hour.

- Visitors rated their overall experience at the farm they visited as excellent (59%), very good (33%) and good (7%). Of the visitors surveyed, no one answered “poor”.

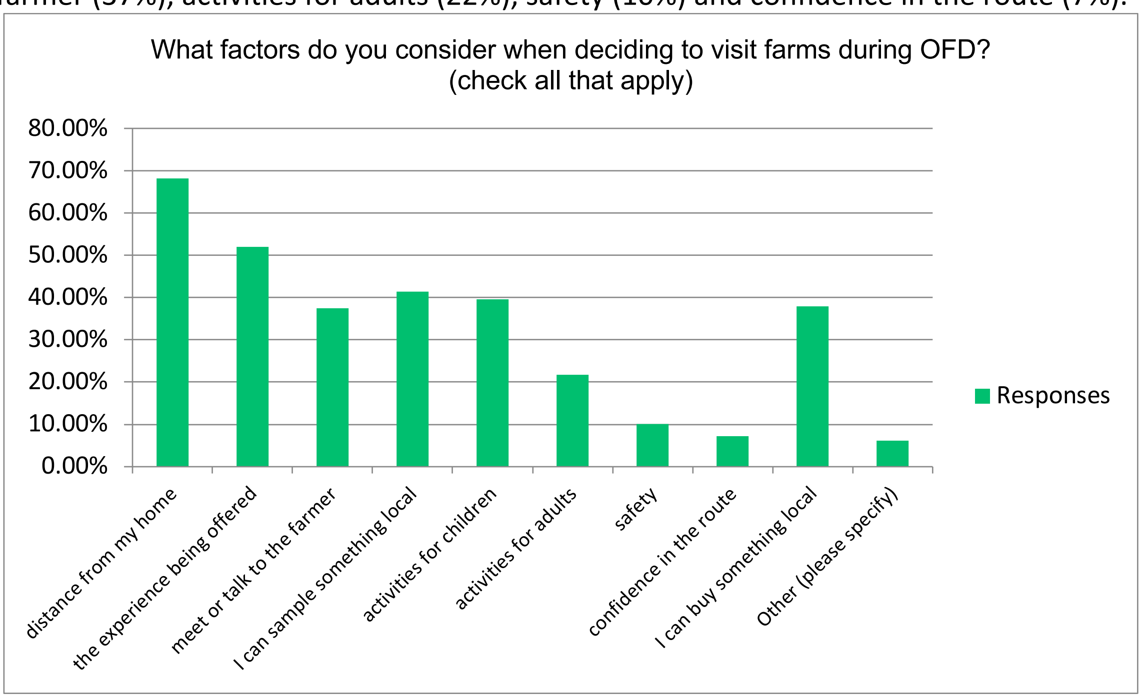
- What visitors enjoyed most about their experience at the farm (as respondents could choose more than one answer, percentages add up to more than 100%): taking in a tour (51%), experiencing & learning about farming life (46%), sampling local foods (37%), meeting and connecting with the host family (34%), learning about different farm/agriculture operations & technologies (21%), meeting & socializing with other visitors (17%), culinary event (11%), hands on workshops and demos (10%), displays of farm equipment (7%), accessibility & amenities (5%).



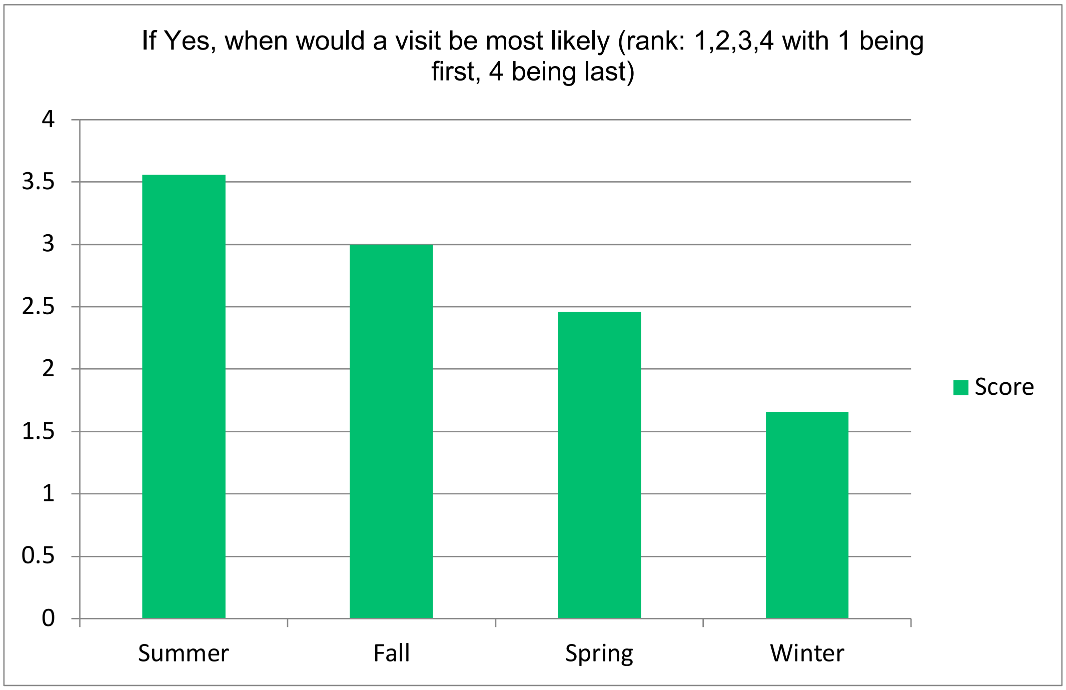
- 72% of the visitors purchased something at the farm, 28% did not purchase anything.
- The average spend by survey participants was $44.97 for a total of $5,261.50 (at the 8 locations surveyed).
- 98% of the visitors surveyed would go to OFD again in the future, 2% said they would not (all indicated that they were visiting Alberta).
- 80% of the visitors would want to see different farms next time, 20% would see the same farm.
- Other experiences visitors would be interested in include (as respondents could choose more than one answer, percentages add up to more than 100%): sampling local foods (41%), hands on workshops and demos (29%), experiencing & learning about farming life (26%), culinary event (23%), taking in a tour (22%), learning about different farm/agriculture operations & technologies (18%), meeting and connecting with the host family (15%), displays of farm equipment (14%), meeting & socializing with other visitors (14%) and accessibility & amenities (9%).



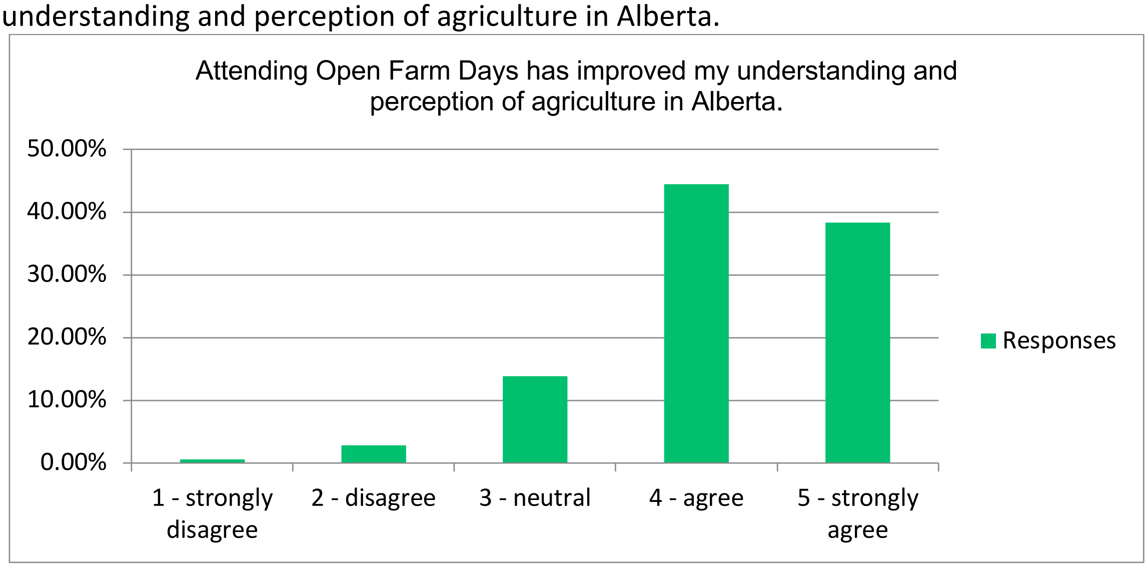
- Factors visitors considered when deciding which farms to visit during OFD included (as respondents could choose more than one answer, percentages add up to more than 100%): distance from my home (68%), the experience being offered (52%), can sample something local (41%), activities for children (40%), can buy something local (38%), meet or talk to the farmer (37%), activities for adults (22%), safety (10%) and confidence in the route (7%).



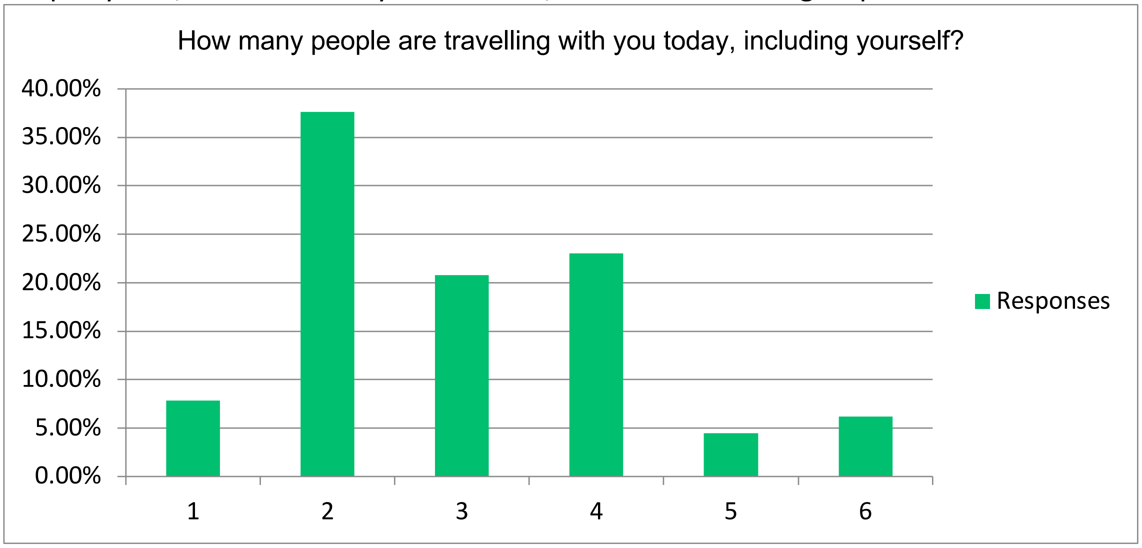
- 85% of the visitors surveyed would participate in agritourism experiences at different times of the year, 15% indicated they would not.



- 83% of the visitors either agreed or strongly agreed that attending OFD improved their understanding and perception of agriculture in Alberta, 14% were neutral and 3% indicated they either disagreed or strongly disagreed that attending OFD improved their understanding and perception of agriculture in Alberta.



- 38% of the respondents travelled in a party of 2, 23% travelled in a party of 4, 21% travelled in a party of 3, 8% travelled by themselves, 10% travelled in a group of 5 or more.



- Slightly more than half of the respondents (55%) indicated that they had children (under 18 years) in their party. This indicates that OFD attracts both families and adults-only visitors.

In summary, responses to the OFD 2018 survey indicates there is huge interest from visitors in learning where their food comes from which could lead to the growth of agritourism in the region.

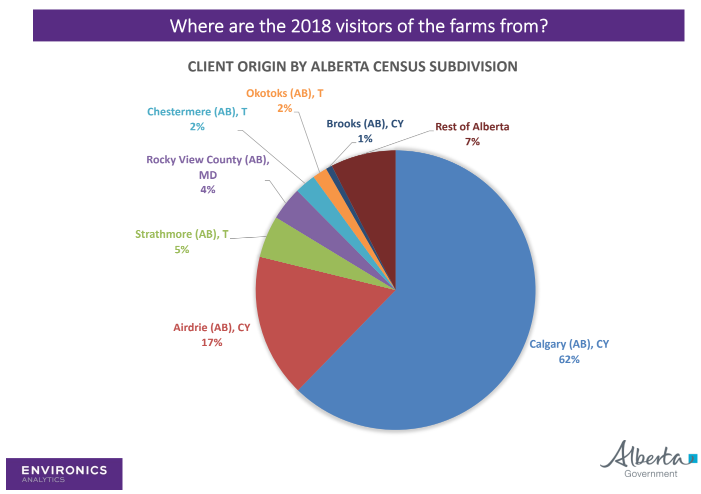
- For 72% of survey respondents, it was their first OFD experience. 98% of those surveyed would do OFD again in the future and 85% would participate in agritourism experiences at different times of the year.
- For those surveyed the three most popular ways of finding out about the event were: OFD Website (34%), Word of Mouth (28%) and Facebook (27%).
- What interested them in attending OFD was experiencing and learning about farming life (73%), taking a tour (50%), sampling local foods (49%).
- Most of the visitors surveyed (75%) would visit between one and two farms over the weekend and spend more than one hour at the farms.
- Visitors surveyed planned their route by using the OFD website (51%), OFD signage along the route (13%) and clicked on Google Maps (12%).
- 72% of the respondents spent between \$3 and \$206 during their farm visits.
- Overall 83% of those surveyed either agreed or strongly agreed that attending OFD improved their understanding and perception of agriculture in Alberta.

The project team also had the opportunity to analyse postal codes gathered during the 2018 Open Farm Days event. A total of 417 postal codes of visitors were collected by the surveyors located at the selected farms as well as postal codes collected from other participating OFD farms in the CFWR region. Alberta Culture and Tourism is licenced to use Environic's PRIZM program which links traveller social values with their associated behaviours and preferences to an Explorer Quotient™ (EQ). This tool helps tourism marketers get into the mind of the traveller before they make a purchase decision and is also used by Travel Alberta as they set their marketing plans. Please see Alberta Culture and Tourism's disclaimer to using PRIZM data in the appendix.

A total of 417 postal codes collected in the region were keyed into the PRIZM 5 platform with the following results.

- 99% of visitors to the farms were from Alberta.

- Within Alberta, over 90% of visitors were from Calgary (62%) and the surrounding census subdivisions, (including Airdrie (17%), Strathmore (5%), Rocky View County (4%), Chestermere (2%)).

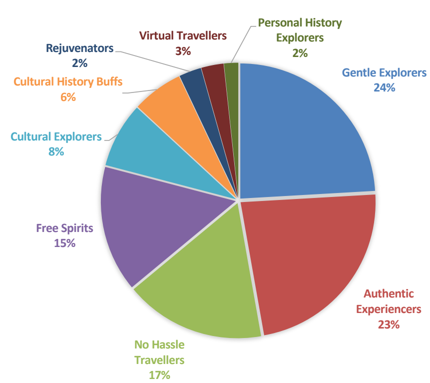


- In comparison, the overall OFD 2018 visitors to farms in general show a wider distribution of visitors, with the larger cities (Edmonton and Calgary) contributing the most, followed by the communities closest to clusters of farms and the cities.

- Farm Visitors (2018) by Explorer Quotient™ (EQ) type: **Gentle Explorers** and **Authentic Experiencers** each account for almost a quarter of visitors to the farms, almost 50% of visitors to OFD farms are of these two EQ types. **No Hassle Travellers** and **Free Spirits** follow with about 15% each. In other words, 80% of the visitors to the farms in the CFWR region are from four EQ types: Gentle Explorers, Authentic Experiencers, No Hassle Travellers and Free Spirits.

- The top four EQ types are defined as:
  - **Gentle Explorers**, part of the Familiarity Seekers segment in EQ and are looking for comfort when they travel. They will place priority on accommodations, services, food and amenities that provide them with the comforts of home and a bit of luxury. However, with lower household incomes, they are often constrained by budget. These are more tentative travellers; safety and security is important to them. In terms of life stage, they range from middle-aged to mature, many with families.
  - **Authentic Experiencers and No Hassle Travellers,** are part of the Learners segment in EQ place priority on truly understanding the people and places that they visit, as this contributes to their own personal growth. They may be more interested in interacting with your staff members, learning their stories and stories about the community. They will appreciate being directed to immersive cultural and historical experiences in the community – particularly if those experiences allow them to interact with the local culture authentically. These visitors tend to be well-educated, mature, with average household income (some will be retired). Many are eco-conscious, and will appreciate your efforts to be environmentally responsible.
  - **Free Spirits** are in the Enthusiastic Indulgers segment. They place priority on being a bit indulgent and getting some pampering while on a vacation. They like to travel in style, so the quality of your facilities, services and amenities will be important to them. They will appreciate being directed to the "must-see" attractions in your community, along with the best places to go for great food and drink. As they often travel with their kids, they will also be looking for kid-friendly services and activities. They tend to be younger and educated at a post-secondary level.
  - To find out more about EQ go to https://www.destinationcanada.com/en/tools.

2018 Farm Visitors by EQ Type

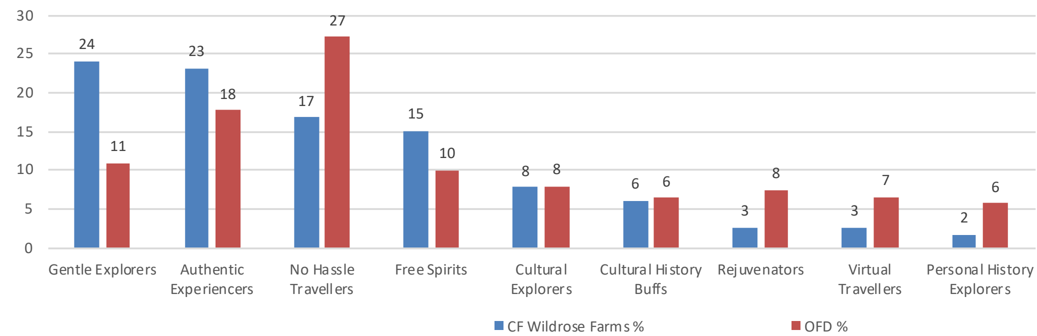


- Gentle Explorers and Authentic Experiences each account for almost a quarter of visitors to the farms.
- No Hassle Travellers and Free Spirits follow with close to 15% each.

ENVIRONICS ANALYTICS

Alberta Government

- EQ type comparison between Community Futures Wild Rose regional farms and OFD visitors in general for 2018: While the same 4 EQ types are the most popular amongst both sample populations, it is the **No Hassle Travellers** that predominate accounting for 27% followed by **Authentic Experiencers** at 18% across all of Alberta.



- Demographic Highlights. This section compares the CFWR visitors to the OFD provincial:
  - 50% of Household Maintainers are between 25 and 44 years of age vs. 43% of OFD provincial.
  - Their household income is high - Household income is $145,345 which is $12,678 above OFD provincial household income.
  - They are well educated - 37% have a University degree of certificate vs. 30% of OFD provincial.
  - Home ownership is important - 85% own their own homes (mostly single-detached) vs. 74% of OFD provincial.
  - They are highly diversified culturally - 52% are immigrants to Canada born outside of Alberta vs. 46% of OFD provincial.
  - They have younger kids - 52% have children under 10 years old vs. 44% of OFD provincial.

- Media Highlights (CFWR region):
  - Top TV Program Types. They watch cooking programs and suspense/crime dramas.
  - Top Radio Formats. They listen to mainstream top 40 and adult contemporary.
  - Newspaper Sections Read. They like to read local and regional news the most.
  - Online Social Networks. They are highly connected. In descending order: LinkedIn, Pinterest, Twitter, Facebook, Instagram and Google+ are their social media tools of choice and most likely multiple tools are used.
  - Used in Shopping. They like online flyers and general information from websites. They do not use Yellowpages (print or online) or mail order.

Media Highlights

Top TV Program Types	%	Index
Movies	53	102
Primetime serial dramas	37	103
Hockey (when in season)	31	100
Suspense/crime dramas	29	106
Cooking programs	29	112
Top Radio Formats	**%**	**Index**
Mainstream Top 40/CHR	27	136
News/Talk	26	97
Classic Hits	20	98
Today's Country	19	96
Adult Contemporary	16	128
Newspaper Sections Read	**%**	**Index**
Local & regional news	62	102
International news/world section	50	96
Movie & entertainment	37	96
Health	31	97
Sports	30	94

Online Social Networks	%	Index
Facebook	63	106
Pinterest	26	123
Google+	25	102
Instagram	20	105
LinkedIn	16	134
Twitter	15	109
Used in Shopping	**%**	**Index**
Flyers delivered to door or in mail	40	93
Coupons	35	97
Flyers in a community newspaper	28	96
Online flyers	27	108
General information from websites	25	102
Local store catalogues	23	86
Direct email offers	22	96
Flyers in a daily newspaper	21	89
Mail order	7	71
Yellow Pages (print or online)	5	69

% = % of population using this media
Index = compares % using this media to general population in Alberta; 100 is average

The PRIZM postal code analysis shows us visitors to the region differ slightly from the province in that the EQ type for CFWR OFD visitors are **Gentle Explorers** (24%), while the EQ type for OFD provincial are **No Hassle Travellers** (27%). This slight nuance should be kept top of mind when planning for OFD and agritourism in the region, including advertising, marketing and activities.

Also, the visitors to OFD do not align completely with Travel Alberta's target market. This slight nuance must be kept in mind when planning for marketing of agritourism in the region and across Alberta.
From the Travel Alberta website: "After extensive research, we identified ***Free Spirits*** as our primary target market. This segment is receptive to marketing/advertising messages, significantly more likely to visit many locations in a single trip, and most likely to tell others about their travel experiences, both online and offline. Our secondary target market is ***Cultural Explorers*** because, like our primary target, they are always planning for their next trip and are likely to travel with friends and family." https://industry.travelalberta.com/visitor-market-insight/visitor-insights/albertas-best-customer.

Important notes:

- While the sample sizes are small in this project, interesting and thoughtful information can be gleaned to understand what visitors to farms are looking for in an agritourism experience.
- Continue collecting postal codes from visitors to the farms during the OFD event, annually, in order to map out trends of the visitors over time.

Comparable Agritourism Operations

A list of approximately ten agritourism operators/owners was compiled through knowledge of the study team and from suggestions of the operators themselves. A question guide was developed to use during in-depth telephone interviews. A total of five in-depth interviews were completed.

At the start of the interview, participants were informed that their individual responses would be kept confidential by the researcher and only reported in aggregate form.

In-depth interviews were conducted with:

- Prairie Gardens, Alberta
- Kraay Family Farm, Alberta
- Kayben Farms / Sunshine Adventure Park, Alberta
- The Jungle Farm, Alberta
- Quinn Farm, Quebec

The interviews ranged between 30 minutes and one hour in length. The following provides a summary of the questions asked of the operators

- **Agritourism Experiences Offered**

The agritourism experiences ranged from U-picks, farm experiences, value-added food to agri-tainment. They have been in business between 10 to 37 years and have between 25,000 and 100,000 visitors annually. They are opened seasonally. Annual revenues range between $500,000 and $2,000,000.

- **Goal of opening the farm to visitors**

The goal of these farms to open their gates to visitors is: increase profitability, they enjoy working with people, they want to educate visitors and they want to stay on the farm / they like the lifestyle.

- **Demographics**
    - The demographics of the types of visitors is mostly families but they also get adults without children, corporate groups and school groups.
    - Most of the visitors come from 60 minutes or less away.
    - The visitors come mostly in the fall and stay between 2 to 6 hours on average.
    - On average the visitors spend between $20 - $30 per person.

- **Revenue Generators**

The main revenue generators are: entry fee, retail sales (products, concession / restaurant), and U-pick. Tours and events can also be revenue generators. Entry fees range from $3.00 to $17.00 per adult.

- **Facilities**

Facilities on the farms include greenhouses, retail space, washrooms, barns to having no permanent buildings.

- **Marketing**

The marketing of the agritourism experiences has changed significantly over the years. While still effective in many cases most are now spending very little on paid advertising and are using social media most often, with Facebook in the lead. However, because marketing tools are constantly changing, is very hard to measure and evaluate, it is important to keep aware and change things as necessary.

Word of mouth was the single most effective marketing tool the farms had. However, its vital to responding quickly and appropriately to queries and problems.

The farms spent anywhere between $1,000 and $30,000 to market their farms. Most effective marketing include: signage outside the business, website, social media. Marketing that is not effective include: chamber of commerce and ag societies.

- **Existence of Business Plan**

All of the farms interviewed had business plans, save for one. The business planning process initially starts with a review of the previous year's financials and cash flows, most likely in January / February. Key staff are invited to planning meetings to share feedback from staff and customers. Staffing requirements are reviewed for the coming year. Then an implementation plan is made.

- **Future Plans**

All of the farms interviewed plan on expanding or diversifying their agritourism experiences and invest more in their operation to either exceed or maintain their previous revenues.

- **Recommend others to go into agritourism**

Most of the farms interviewed recommended others to go into agritourism but with caution. You have to be passionate about agriculture and be a people person, and you can be financially sustainable. Love people in your space and want to share, have good communication skills to manage staff and visitors. Know your customers or potential customers, what are they willing to drive for. Weather is not your friend, it's very unpredictable so you need to plan to minimize the risk.

- **Biggest Opportunities / trends**

Biggest opportunities from the farms interviewed were varied and include: remember there are lots of ways to do things, do it big or small, it depends on the budget. People are more interested in knowing about farming and the food we eat. Focus on local food, nutrition, eating healthy food. Corporate events are on the radar of some to combine with a local chef and offering local food experiences. Some are connecting with local tour operators and international markets to bring in visitors to their farm.

- **Biggest challenges**

Biggest challenges for the farms interviewed were: expanding the season (the season is short, weather patterns are changing) and availability of reliable labour / staff, especially for the front line. Things that were usually not a problem were: crop or animal production logistics. Other items like permitting and zoning and other regulations and legal constraints can be challenging or not, depending on the council and decision makers of the day. Promotion and advertising gets easier over time.

- **Operators rating of Profitability**

Operators rating of profitability scored between 3 and 4 out of a top score of 5, for all farms interviewed. Agritourism is a reasonably profitable venture.

- **Is collaborating / partnering beneficial in agritourism**

All farms interviewed agree collaborating is very beneficial to agritourism success. It includes peer to peer sharing of knowledge, equipment, staff, social marketing. Getting to know tourism staff and tourism service providers in the area (transportation). Working in a cluster gives the ability to offer more experiences and sharing of risk.

- **Words of wisdom (or lessons learned)**

The farms were happy to share words of wisdom to other agritourism operators or those considering agritourism for their farm:

  - Invest in highway and internal signage.
  - Invest in staff training.
  - Know who you are getting into business with.
  - Clear communications style (family vs. business).
  - Crops – weather is a huge factor, you have lean years and good years.
  - Be passionate and share why you farm with visitors.
  - Buy insurance ($5 million liability).
  - Don’t risk your home or livelihood.
  - Plan for the future regarding parking area for visitors.
  - Beforehand, do your research. For a couple of seasons work with an operator and get the tricks of the trade.
  - Research - know who your customers are.
  - Location - locate near a big city and be on or very near a paved road.
  - Keep your day job. Agritourism can be seasonal, you need some other revenue stream to off-set the slow times.
  - Agritourism, like tourism, is a long game. You need a longer term vision in order to become profitable and sustainable.

5. Conclusions

The research collected and synthesized through this phase of the project helped to further understand the desires of visitors and the potential opportunities and challenges for farms interested in exploring and participating in agritourism.

Key Takeaways from Phase I

- Because of the wide variety of terms and definitions and for the purposes of this project we will use the term *agritourism*, as this term seems to have the widest application. It has to be kept in mind additional education and communication may be required to ensure the stakeholder groups and consumers understand the terms and expectations. As we progress through the phases of this research project, we will define the essence of agritourism for the region of Community Futures Wild Rose.

- Research shows tourists today want to have authentic experiences when travelling and visiting, agritourism is an option that aligns well with their goals. Agritourism can provide agricultural operators and communities with many benefits. With planning and collaboration, agritourism is a platform where farmers can tell their story (educate), diversify product offerings, build customer loyalty and widen their revenue streams. Rural communities are also positioned to support the agritourism clustering effect with their offerings of needed assets and services.

- From the OFD surveys collected in the region, it was the first OFD experience for 72% of the respondents. 98% of the visitors surveyed would go to OFD again in the future. 85% of the visitors surveyed would participate in agritourism experiences at different times of the year. 83% of the visitors either agreed or strongly agreed that attending OFD improved their understanding and perception of agriculture in Alberta.

- From the PRIZM analysis, 80% of the visitors to the farms in the CFWR region are from four Explorer Quotient™ (EQ) types: **Gentle Explorers** (24%), **Authentic Experiencers** (23%), **No Hassle Travellers** (17%) and **Free Spirits** (15%). To find out more about EQ go to https://www.destinationcanada.com/en/tools

- From the in-depth interviews with existing agritourism operators:
  - Agritourism is a reasonably profitable venture.
  - Agritourism, like tourism, is a long game. You need a longer term vision than in other sectors.
  - Working in clusters gives the ability to offer more experiences and sharing of risk.
  - Words of Wisdom from those who have been there:
    - Beforehand, do your research.

  - Be passionate and share why you farm with visitors.
  - Clear communications style (family vs. business).
  - For a couple of seasons work with an operator and get the tricks of the trade.
  - Research - know who your customers are.

- There is work to be done when becoming an agritourism destination. It requires cooperation and effort between governments, government agencies, stakeholders in tourism and agriculture sectors and community. These diverse and varied groups must come together to create a regional identity or theme based on the local stories, history, culture, food, traditions and terrain. Having a common goal around agritourism in the region will lead to joint marketing initiatives and strategies and better awareness by the visitors. Careful thought and planning with the farms and stakeholders in a region is a must to ensure success.

- It is suggested that if a farm family is interested in opening their gates to visitors and exploring agritourism, the decision must be made by all of the key players on the farm team. Opening your gates to visitors is quite different from farming. The farm team has to enjoy the public and be interested in educating them about agriculture. Tourism training is available throughout the province; building agritourism capacity within each operation.

Next Steps

Phase II of the study focuses on Stakeholder Engagement. Agritourism operators in the CFWR region will be asked to participate in confidential interviews with the research team. Also, stakeholders to the community will be interviewed. Therefore, two separate interview guides will be utilized, one for the farms and the other for stakeholders, to understand how individual farms and stakeholders in the region view agritourism and its opportunities and challenges.

Appendix

- CFWR Agritourism Survey: OFD Visitors
- Comparable Question Guide
- Disclaimer of Liability

CFWR Agritourism Survey: OFD Visitors

Date: ______________________________ **Farm:** ____

Introduction (please read)
My name is ________________, I'm an independent researcher and I am conducting market research for Community Futures Wild Rose during the Open Farm Days weekend. **Agritourism** is a relatively new and growing segment in Alberta that appeals to many people as they want to meet farmers and see farms in action. Would you have a few minutes to answer questions for me about your agritourism experience today? It should not take more than 7 minutes to complete. Please only complete one survey per group travelling together. **As per our company policy, all of your individual responses will be kept confidential by the researcher.**
We abide by the Uniform Code of Professional Conduct for the Canadian Association of Management Consultants.

1. Is this your first Open Farm Days Experience? _____ yes _____ no

2. How did you find out about Open Farm Days (OFD)? (check all that apply from the list below)

_____ **OFD Website** (www.albertafarmdays.ca)
_____ **OFD Signage**
_____ **Newspaper Ad (specify):** ______________________________
_____ **Radio Ad (specify):** ______________________________
_____ **Social Media Platforms (specify):**
_____ Facebook
_____ Twitter
_____ YouTube video
_____ Instagram
_____ Pinterest
_____ other ________________________

_____ **Word of Mouth**
_____ **News Story (specify):** ________________________
______ **Event (specify):** ________________________
_____ **Other (Specify):** ________________________

3. What interested you in attending Open Farm Days 2018? (check all that apply)

_____ Experiencing & learning about farming life
_____ Hands on workshops and demos
_____ Meeting & socializing with other visitors
_____ Taking in a tour
_____ Meeting and connecting with the host family
_____ Learning about different farm/agriculture operations & technologies
_____ Other: __________________________________
_____ Sampling local foods
_____ Accessibility & amenities
_____ Displays of farm equipment
_____ Culinary event

4. How did you plan your route to get to the farms today? (check all that apply)

_____ OFD Website
_____ Community Futures Wild Rose Guide
_____ OFD Signage along route
_____Other:________________________

5. How many farms do you plan on visiting this weekend? (please circle a number, including this farm)

1 2 3 4 5

5a. Which farms did you visit on the OFD weekend? (please list names of farms)

5b. How much time did you spend at the farms you visited (approximately)?

_____ < 30 min   ______ 30 min – 1 hour   _____ > 1 hour

6. On a scale of, 1 – 5 how would you rate your overall experience at this farm today? (circle)

1	2	3	4	5
Poor	**Fair**	**Good**	**Very Good**	**Excellent**

6a. What did you enjoy most about your experience? (check all that apply)

_____ Experiencing & learning about farming life
_____ Sampling local foods
_____ Hands on workshops and demos
_____ Accessibility & amenities
_____ Meeting & socializing with other visitors
_____ Taking in a tour
_____ Displays of farm equipment
_____ Meeting and connecting with the host family
_____ Culinary event
_____ Learning about different farm/agriculture operations & technologies
_____ Other: ______________________________

6b. Any suggestions for improvement for this farm?

____

7. Did you purchase anything at the farm?

Yes _______   No________

7a. If yes, please detail what you purchased and how much you spent.

Item	**Price**
____________________	________
____________________	________
____________________	________
____________________	________
Total ____________________	________

8. Would you go to OFD again in the future?

Yes _______   No________

8a. If yes, would you want to see the same farm or would you go to different farms? (please explain)

_____ same farm(s)   _____ different farms

Why: ____

8b. If no, please explain why: ____

9. What other experiences would you want to see on this farm? (check all that apply)

_____ Experiencing & learning about farming life
_____ Sampling local foods
_____ Hands on workshops and demos
_____ Accessibility & amenities
_____ Meeting & socializing with other visitors
_____ Taking in a tour
_____ Displays of farm equipment
_____ Meeting and connecting with the host family
_____ Culinary event
_____ Learning about different farm/agriculture operations & technologies
_____ Other: ______________________________

10. What factors do you consider when deciding to visit farms during OFD? (check all that apply)

_____ distance from my home
_____ the experience being offered
_____ meet or talk to the farmer
_____ I can sample something local
_____ activities for children
_____ activities for adults
_____ safety
_____ confidence in the route
_____ I can buy something local
_____ other: ________________________________

11. Would you participate in other agritourism experiences at different times of the year?

Yes ________ No_________

11a. If Yes, when would a visit be most likely (rank: 1,2,3,4 with 1 being first, 4 being last)

_____ Summer ______ Fall _____ Spring ______ Winter

12. Attending Open Farm Days has improved my understanding and perception of agriculture in Alberta. (please circle response)

1	2	3	4	5
Strongly Disagree	**Disagree**	**Neutral**	**Agree**	**Strongly Agree**

13. How many people are travelling with you today, including yourself?

_____ 1 _____ 2 _____ 3 _____ 4 _____ 5 ____ 6 or more

14. Gender and ages of individuals in your party. (add in number)

_____ # M _____ # F _____ # O

_____ # children (younger than 18 years old) _____ # adults (18 years and older)

15. Postal code of where you live. (6 digit postal code 5 digit zip code)

____

This concludes our survey.

Thank you very much for you time and participation in this survey today! The information collected will be entered as data to help us understand more about agritourism in Alberta.

Question guide completed by: _________________________________

March 12, 2019

Agritourism Operators Question Guide

Survey #

Date: ______________________________________

Who: ____

Position: ____

Company/Website: ____

Phone Number: _____________________________________

Email: ____

Type of Farm: ____

Introduction (please read)
My name is ________________, I'm an independent researcher and I am conducting research for Community Futures Wild Rose to understand more about agritourism. **Agritourism** is a relatively new and growing segment in Alberta which appeals to many people as they want to meet farmers and see farms in action. Would you have a few minutes to answer questions for me about your operation? It should not take more than 20 minutes to complete. **As per our company policy, all of your individual responses will be kept confidential by the researcher and only reported in aggregate form.** ***We abide by the Uniform Code of Professional Conduct for the Canadian Association of Management Consultants.***

1. **Please describe your agritourism experience at your farm.** (look at website) (**how many visitors per year?) (Value-add before or after agritourism?**)

1a. When did you start your agritourism business? (year). What did you do before?

- 1-5 years
- 6-10
- 11-15
- 16-20
- 21>

1b. Hours of operation and seasonality

2. **Why did you open your farm/ranch to visitors?** (Check all that applies)
   - Increase profitability
   - Enjoy working with people
   - Educate visitors
   - Provide family employment
   - As a marketing tool
   - Other

3. Who visits your agritourism operation?

3a. Describe your visitors – (Segments, as a % of revenue. Where are they coming from)?

Avg % of type of visitor?

- Families
- Adults without children
- Teens/young adults
- School groups
- Seniors groups
- Corporate groups
- Other

Avg % of visitors coming from where?

- Within 30min
- Within 60min
- Within 1.5hrs
- Calgary
- Edmonton
- Within Canada
- Outside Canada

3b. When do they visit.

Avg % of season?

- Spring
- Summer
- Fall
- Winter

3c. How long do they visit (average)

- Less than 1 hour
- 1 to 2 hours
- 3 hours
- 4 or more hours

3d. How much do they spend (average)

4. **What are the revenue generators for your agritourism business?** (by %)

- Entry fee
- Retail sales, ag products
- Retail sales, non-ag products
- Corn maze / pumpkin patch
- U-pick
- Farm/ranch tours & field trips
- Events
- Nature activities, workshops
- Farm stays
- Other

4a. What do you charge for entry fee?

Adult Family
Child
Senior

5. For local farm survey: **What is your gross revenue for your agritourism operation?**

- Less than $1000
- $1000 - $4999
- $5000 - $9999
- $10,000 - $19,999
- $20,000 - $29,999
- $$30,000 - $49,999
- $50,000 - $99,999
- $100,000 or more

6. What facilities for visitors or special events do you currently offer?

- Weddings, retreats, workshops
- Camping, RV
- Cabins / Accommodations
- Cultural festivals (e.g. thanksgiving, Halloween)
- Equine events
- Youth camps

7. How do you market your experience?

7a. Rate the effectiveness of each type of promotion used (1 = not effective; 5 = highly effective)

- Chamber of Commerce
- Ag society
- Regional tourism guide
- Visitor Info centre
- Paid advertising
- Business card or brochure
- Newsletter
- Signage outside business
- Direct mailings (incl. email)
- Website
- Feature story
- Social media (which ones?)
- Word of mouth

7b. How much do you spend on marketing your agritourism operation?

- Less than $1000
- $1000 - $4999
- $5000 - $9999
- $10,000 - $19,999

8. Do you have a business plan for agritourism operation? For the farm/ranch?
Yes/no yes/no

How do you plan?

9. What are your future plans regarding agritourism for your operation?

- Expand or diversify experiences or products
- Reduce experiences or products
- Invest more in agritourism
- Hire more employees
- Maintain current revenue
- Go out of business (agritourism only)

10. Would you recommend other farm businesses to go into agritourism?

Yes _______ No________

10a. Why? Or Why not?

10b. What are your biggest opportunities / trends in agritourism?

11. What are your biggest challenges for your agritourism operation?
Score: 1 = Not a problem; 5 = Very challenging

- Longer agritourism season
- Expanding agritourism
- Profitability
- Crop or animal production logistics
- Promotion and advertising
- Liability or insurance issues
- Permitting and zoning
- Other regs & legal constraints
- Availability of reliable labour/staff

12. **Operators rating of agritourism operation profitability** (score 1 = not at all profitable; 5 = highly profitable)

13. Is collaborating / partnering important in agritourism?

Yes _______ No________

13a. Why or Why not? Examples?

14. **What words of wisdom would you give to someone wanting to get into agritourism for their farm business?** (prompt: lessons learned)

15. May we be able to contact you in the future regarding this agritourism research, if required?

Yes _______ No________

15a. Additional Contact Information:

16. Can you recommend anyone else that we should speak with?

17. Do you have any additional comments or questions?

This concludes our survey.

Thank you very much for you time and participation in this research!

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