



CASE STUDY

On-farm Agritourism Activities in Marion County, Oregon from 2017 to 2018

Author: Mary Stewart, Oregon State University Extension Service
Research Specialist: Weiwei Wang, University of Vermont Extension
Research Assistant: Audrey Comerford, Educational Program Assistant 2, Oregon State University
Student Interns: Jaysa Coons, Sean Murphy, Oregon State University
Interactive Mapping: Alan Dennis, Oregon State University Extension and Experiment Station Communications.

Photos: Lynn Ketchum and Mary Stewart, OSU Extension, Bauman's Farm and Garden, Oregon Farm Loop

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ABOUT THIS STUDY



Photo: Mary Stewart

This study describes the scope of on-farm or core agritourism activities offered to visitors on 75 agritourism operations in Marion County during a study period spanning 2017 and 2018. It shows the types and numbers of activities offered, the seasons of agritourism, and reveals the average and median acreage and land use districts typical of agritourism operations. This initial information provides a benchmark for future measurement of the industry segment in Marion County.

Agritourism activities include both agricultural product sales and authentic farm experiences that may be paid or unpaid.

In addition to gathering information about activities, this study enhances an understanding of the agritourism industry. A universal understanding of agritourism is needed for clear communication, reliable and consistent measurement, informed policies, and programs that support farms and their communities.

METHODOLOGY



Photo: Mary Stewart

Researchers generated a list of Agritourism Operations in Marion County, and compiled information about each record in accordance with [agritourism inventory best practices](#). Data was gathered through mail surveys, telephone interviews, and in person. Data was logged into a master spreadsheet. Data gathered in 2017 was fact-checked by mail or phone with the operations and data was re-checked, updated and expanded in 2018. The categories of agritourism activities used on the spreadsheet align with the nationally-established five categories of agritourism activities. Subcategories were also used in order to provide more detail about activities.

The data was coded for quantitative analysis in Excel and descriptive analysis of the categories was conducted using SPSS version 25 (IBM Corp). Thematic analysis was also conducted where possible using Excel (Word). IBM Corp. Released 2017. IBM SPSS Statistics for Windows, Version 25.0. Armonk, NY: IBM Corp.

The interactive map display tool is provided freely by Awesome Table. It uses a Google Sheet as its data source. See complete information about this methodology in the [Interactive Map section](#) of this report.

ABOUT AGRITOURISM ACTIVITIES

The Conceptual Framework of Agritourism Activities in the US¹ model, describes agritourism as an enterprise that connects consumers and tourists with agricultural producers, products and places, usually on farms and ranches. It's a way for agriculturalists to diversify their business, attract more customers, and remain sustainable.

The conceptual framework illustrates the activities commonly offered on agritourism operations in the US and divides the activities into five major categories: farm-direct sales, education, hospitality, outdoor recreation and entertainment.*

FIGURE 1. FIVE MAJOR CATEGORIES OF AGRITOURISM ACTIVITIES

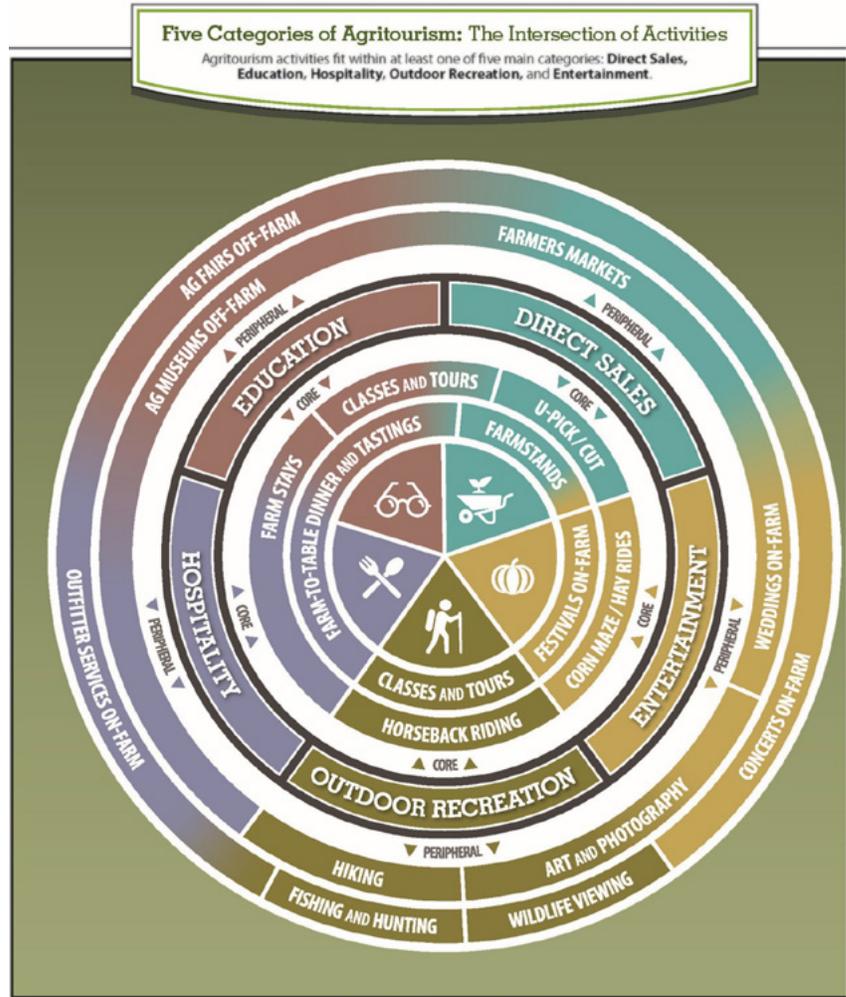


Figure 1. Illustrates a conceptual framework that incorporates core and peripheral tiers, as well as five categories of activities: direct sales, education, hospitality, outdoor recreation and entertainment. Illustration Erik Simmons © Oregon State University.

¹The Conceptual Framework of Agritourism Activities in the US, Chase, L., Stewart, M., Schilling, B., Smith, B., & Walk, M (2018). Agritourism: Toward a Conceptual Framework for Industry Analysis. *Journal of Agriculture, Food Systems, and Community Development*, 8(1), 13-19. <https://doi.org/10.5304/jafscd.2018.081.016>

*This framework is not intended to be the final word. Rather, it is meant to stimulate and simplify conversations between planners, government officials and agritourism farm operators.

FARM-DIRECT SALES

farm stands, u-pick, farmers markets.



Photo: Mary Stewart

Agritourism activities included in the conceptual framework fit within at least one of the five categories and may span multiple categories.

An activity includes both paid and unpaid products and experiences.

EDUCATION

historical or informational tours, how-to classes, tastings (wine, cider, cheese, fruit...)



Photo: Mary Stewart

Agritourism activities included in the conceptual framework are separated into core and peripheral activities.

Core activities take place on farms, are deeply connected to agriculture, and are generally accepted as agritourism in the US.

HOSPITALITY

overnight farm stays, farm-to-table dinners.



Photo: Oregon Farm Loop

In contrast, peripheral activities may not be considered agritourism by some because they take place off the farm or are not deeply connected to agriculture.

OUTDOOR RECREATION

fishing, wildlife viewing, horseback riding, hiking, hunting.



Photo: Alexander Dummer from Pixel

ENTERTAINMENT

on-farm festivals, live music, heritage activities like corn mazes, hayrides, and animal displays.



Photo: Mary Stewart

AN INTERACTIVE MAP

OF AGRITOURISM OPERATIONS AND ACTIVITY CHARACTERISTICS IN MARION COUNTY

FIGURE 2. INTERACTIVE MAP

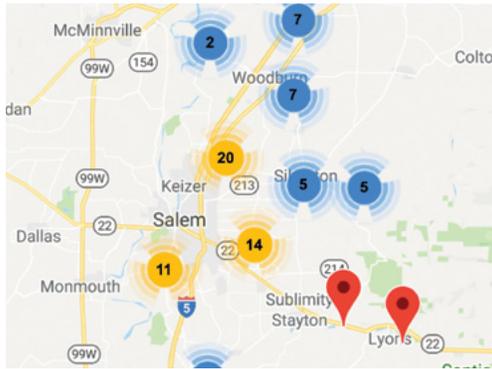


Figure 2. The map of 75 agritourism operations in Marion County designed by Alan Dennis, Oregon State University Extension and Experiment Station Communications.

Click on the [map](#) to see an interactive map of the 75 agritourism operations and their activities studied in Marion County in 2017 and 2018.

Methodology- The interactive map display tool is provided freely by Awesome Table. It uses a Google Sheet as its data source, with a special 2nd row under the column headers to define how each data field should be displayed, as well as how it can be sorted and filtered. For example, the Farm Name column is defined as a StringFilter, which means that someone can type part of a farm's name into a search box and it will filter the resulting entries. Awesome Table needs latitude and longitude coordinates to be able to place the map markers, so they provide a tool to convert physical addresses into coordinates with a tool called Geocode. The informational card that pops-up when a map marker is clicked is fully customizable to display any field in the Google Sheet, and is styled using HTML and CSS on a separate page called 'Template' in the Google Sheet.

Disclaimer: Data presented in this map is not to be considered an advertisement of farm products and services. It reflects the information available to researchers during the study period. Farm businesses are constantly changing. As such, please note that some farms have changed their business model since inception of this study and may not be currently open to the public for sales of products or experiences as described in this study.

THE ANALYSIS OF AGRITOURISM ACTIVITIES IN MARION COUNTY

The following figures and tables were developed from a survey of 75 farms practicing agritourism including direct sales activities in Marion County, Oregon in 2017 and 2018. The average acreage for the farms is 68.7, with a median of 31 acres.

[Figure 3.](#) Types of On-Farm Sales Methods

[Figure 4.](#) Types of On-Farm Direct Sales and other Agritourism Activities

[Table 1.](#) Direct Sales and other Agritourism Activities

[Figure 5.](#) Agritourism Seasons

[Figure 6.](#) On-farm product direct sales activities

[Figure 7.](#) Types of Educational Experience Activities

[Figure 8.](#) Number of educational activities

[Figure 9.](#) Types of hospitality and food service activities

[Figure 10.](#) Number of farms hosting on-farm hospitality and food service experience activities

[Figure 11.](#) Types of entertainment experience activities offered

[Figure 12.](#) Off-farm farmers markets

[Figure 13.](#) Farm land use district of Marion County respondents

FIGURE 3. TYPES OF ON-FARM SALES METHODS (n=75)

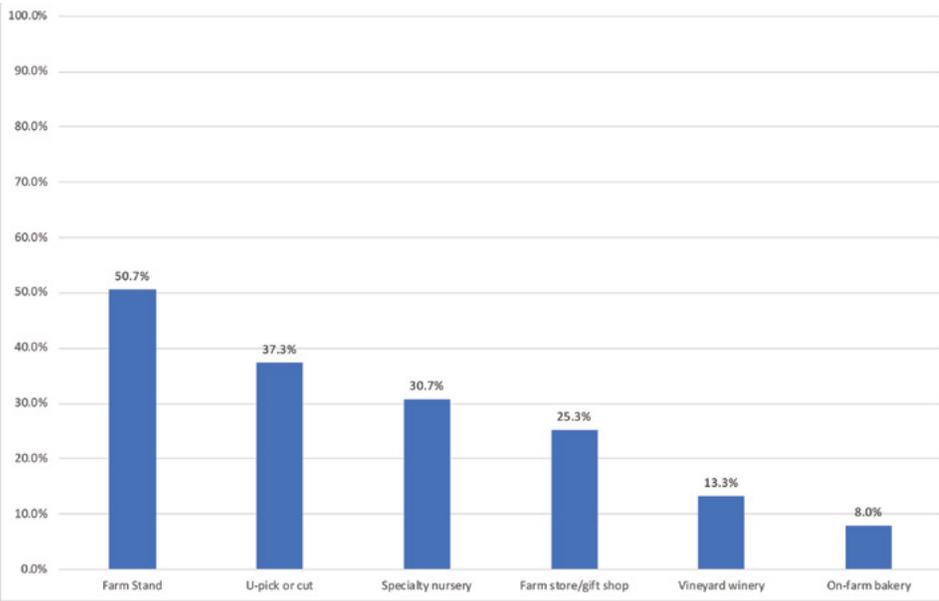


Figure 3 shows the types of on-farm direct-to-consumer product sales methods on the farms surveyed. More than half of the farms sold products from farm stands, and more than one-third of the farms sold products by u-pick or u-cut. A garden center area to sell specialty nursery stock also made up a significant portion of direct product sales activities.

FIGURE 4. TYPES OF ON-FARM DIRECT SALES AND OTHER AGRITOURISM ACTIVITIES (n=75)

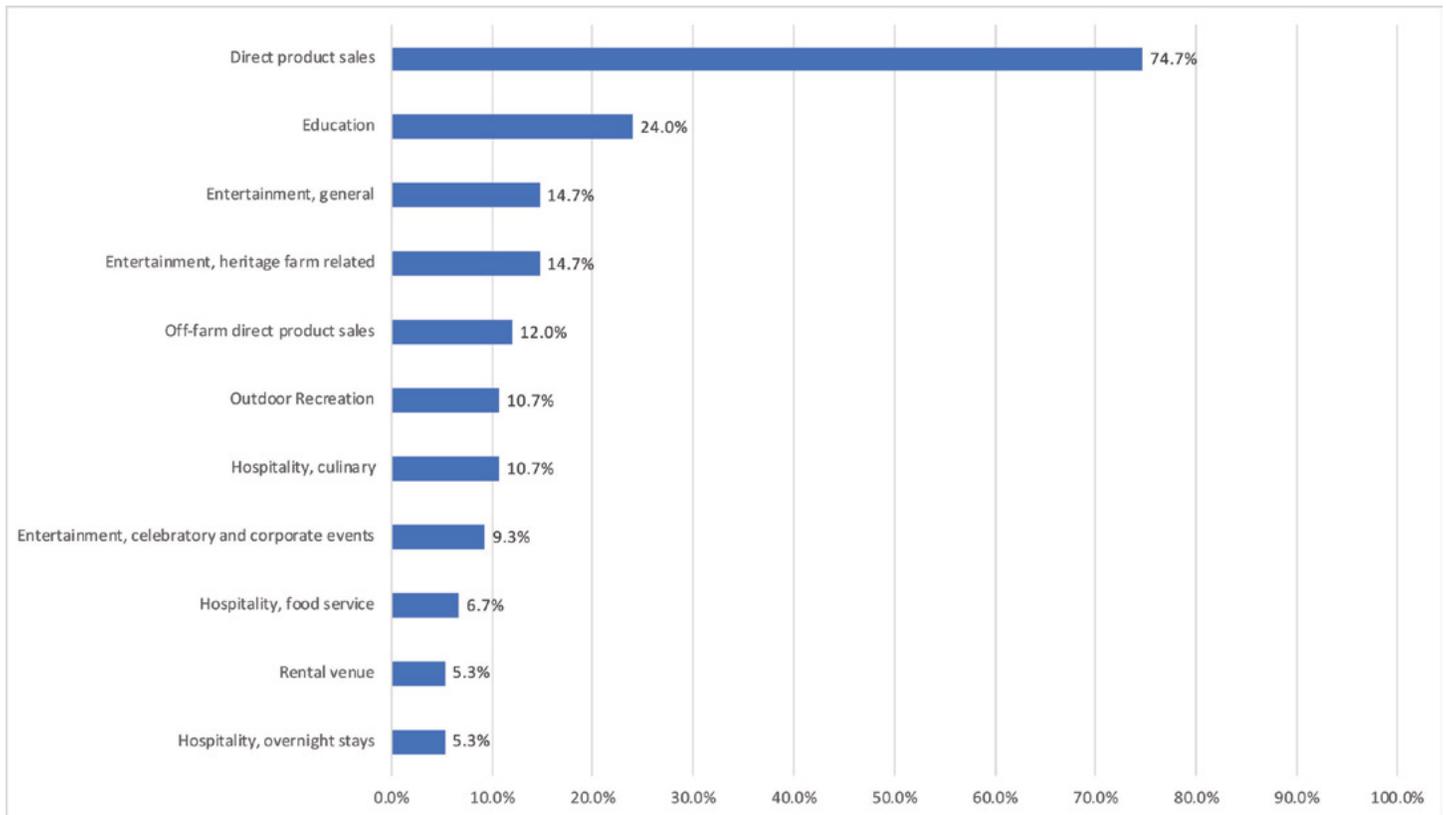


Figure 4 shows the different types of agritourism and/or direct sales activities that are offered overall by Marion County farms. While the majority (74.7%) of farms participate in direct product sales, many of these farms also offer experience activities to visitors.

FIGURE 5. AGRITOURISM SEASONS (n=75)

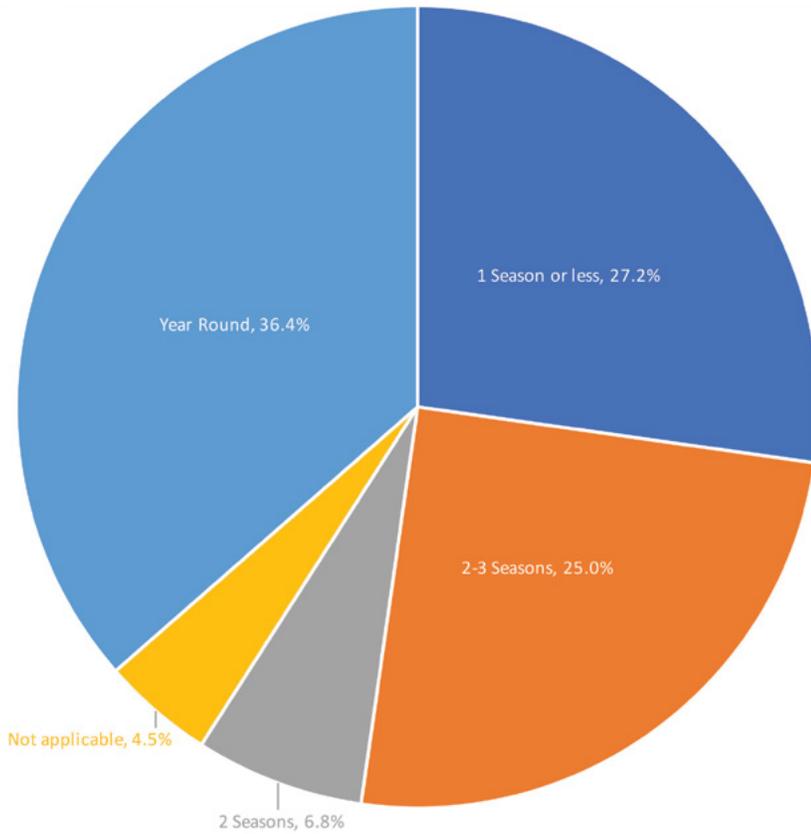


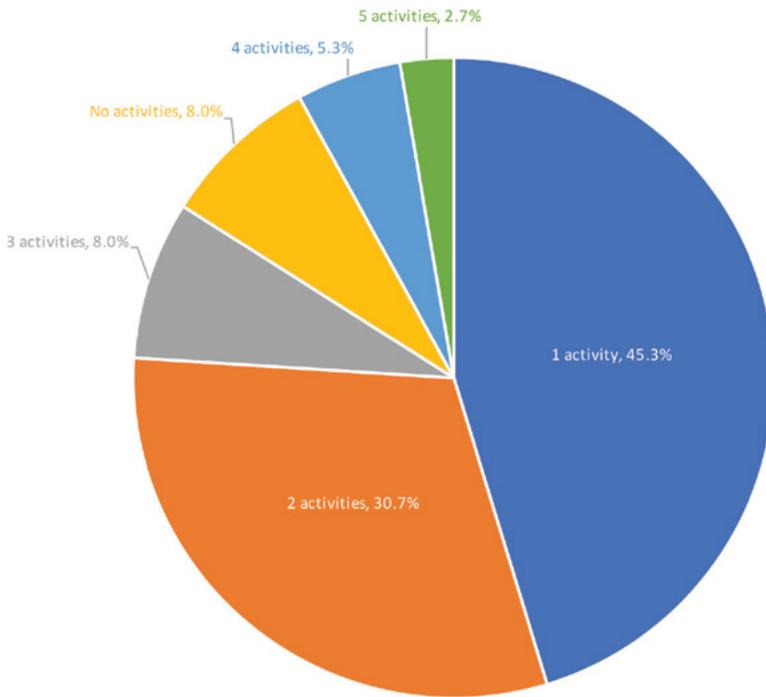
Figure 5 shows the time of year that Marion County farms offer agritourism or direct sales activities. 36.4% offer some type of activity year-round, whether that is tastings on weekends, or daily offerings. About 52% of the farms offered some type of seasonal activity, including longer season activities such as direct product sales like a farm stand, or shorter season activities like u-cut Christmas trees. Table 1 to the right shows the various activities within each primary category of agritourism including direct sales activity in Figure 4.

TABLE 1. DIRECT SALES AND OTHER AGRITOURISM ACTIVITIES

Category of direct sales and other agritourism activities (on-farm, unless specified off-farm)

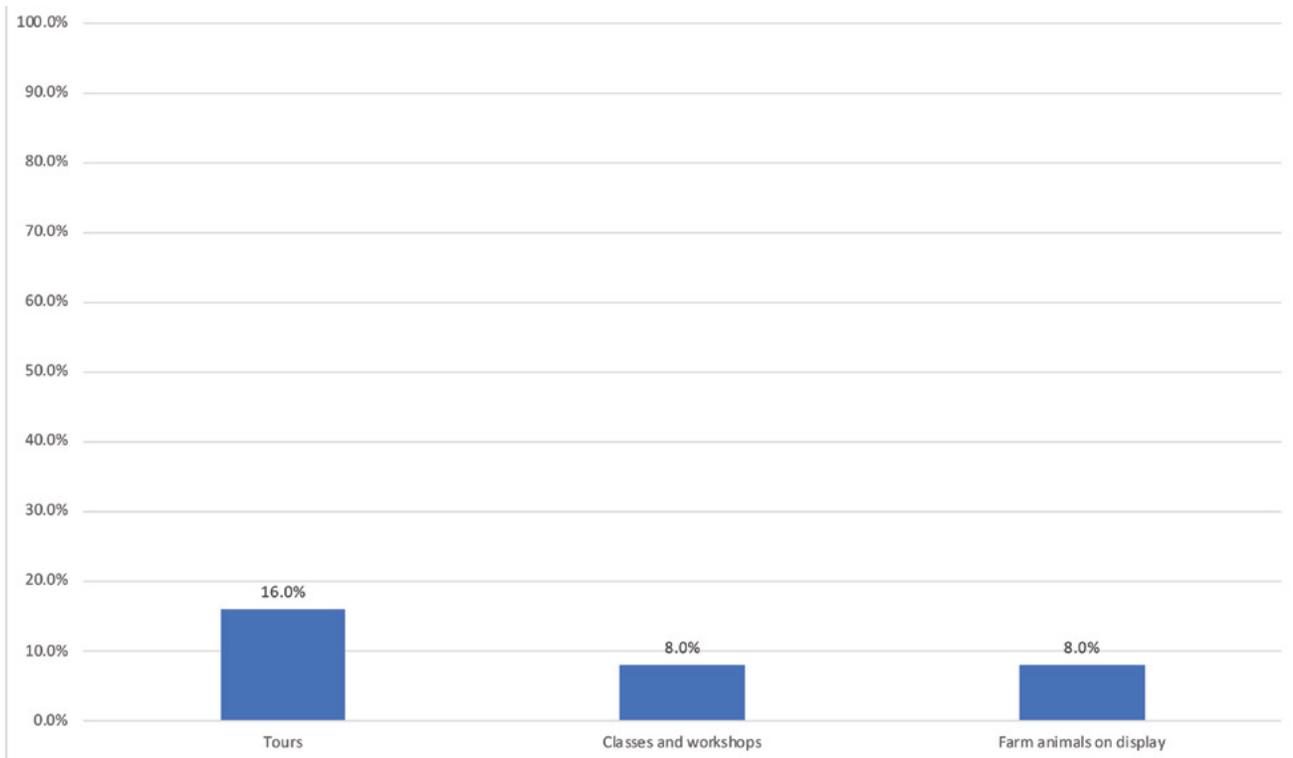
DIRECT PRODUCT SALES	Farm stand/store U-pick Choose n Cut Christmas trees
EDUCATION	Tours Clinics Demos Farm animal (to pet or view)
HOSPITALITY, CULINARY	Farm-to-Table dinners Winemaker dinners Brew fests
HOSPITALITY, OVER-NIGHT STAYS	Farm stays Lodging, general Camping B&B
HOSPITALITY, FOOD SERVICE	Prepared or processed on-farm and served to customers
RENTAL VENUE	Space rentals for events
OUTDOOR RECREATION	Hiking Photography Birding Horseback riding
ENTERTAINMENT, HERITAGE FARM RELATED	Pumpkin patches Corn mazes Festivals
ENTERTAINMENT, CELEBRATORY AND CORPORATE GATHERINGS	Weddings Parties Corporate retreats
ENTERTAINMENT, GENERAL	Concerts Art programming Non-farm festivals
OFF-FARM DIRECT PRODUCT SALES	Farmers markets Festivals

FIGURE 6. NUMBERS OF ON-FARM PRODUCT DIRECT SALES ACTIVITIES (n=75)



It should be noted that many farms had more than one type of direct product sales activity. For example, some farms offered a produce farm stand as well as a garden center area with specialty nursery stock. This is evidenced by Figure 6, which shows the number of direct product sales activities for farms. While almost half of farms had only one activity, nearly half of the other farms participated in two or more direct product sales activities. 8% had no direct product sales activities.

FIGURE 7. TYPES OF EDUCATIONAL EXPERIENCE ACTIVITIES (n=75)



About one-quarter of respondents offered educational experience activity on the farm, which ranged from educational tours to workshops and classes, and farm animals on display, as shown in Figure 7.

FIGURE 8. NUMBER OF EDUCATIONAL ACTIVITIES (n=75)

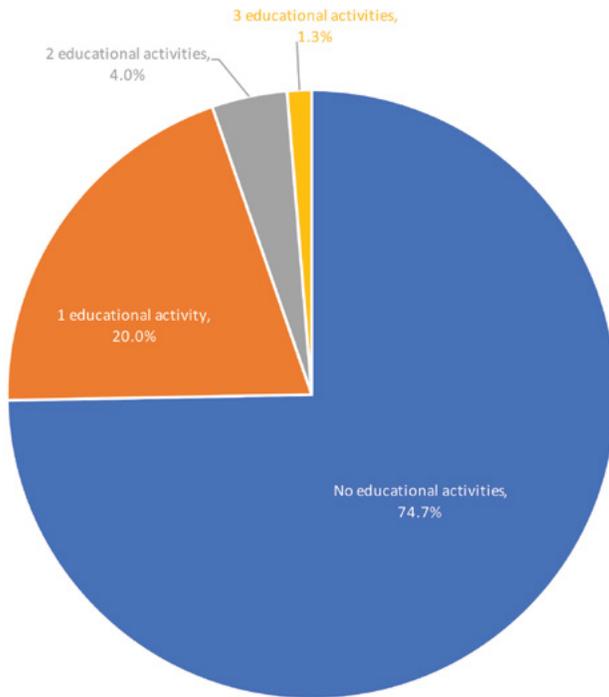
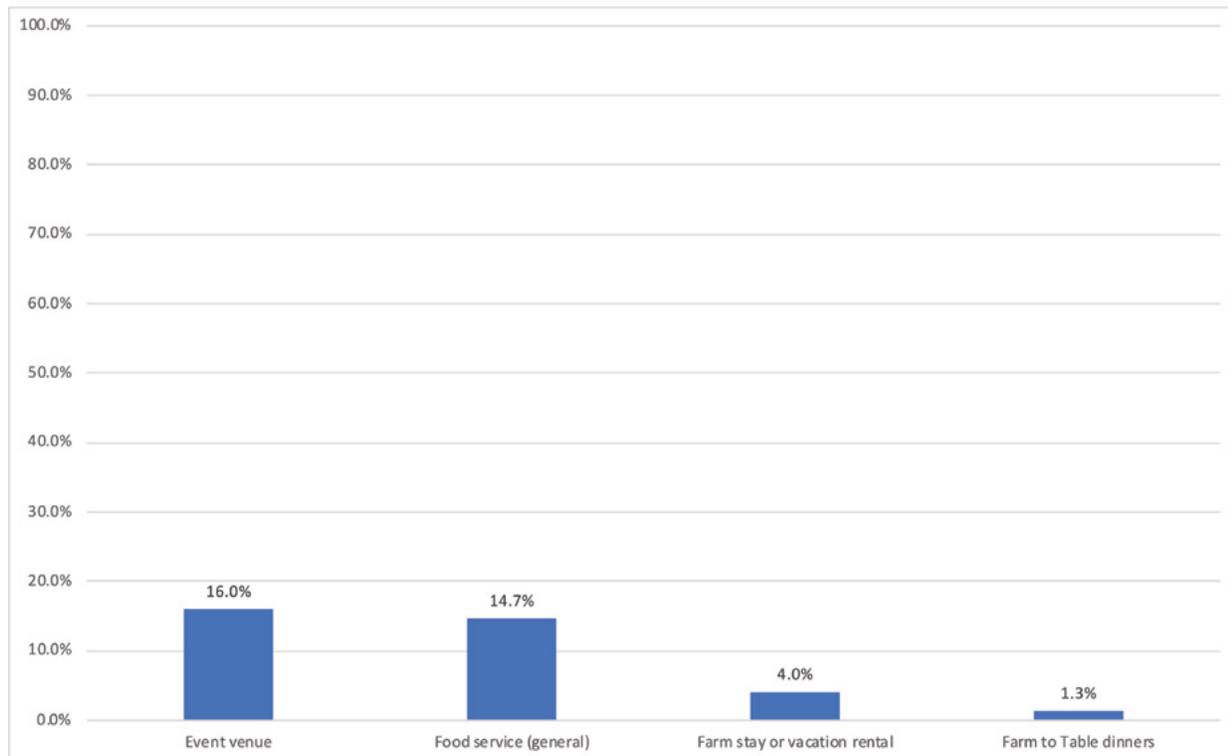


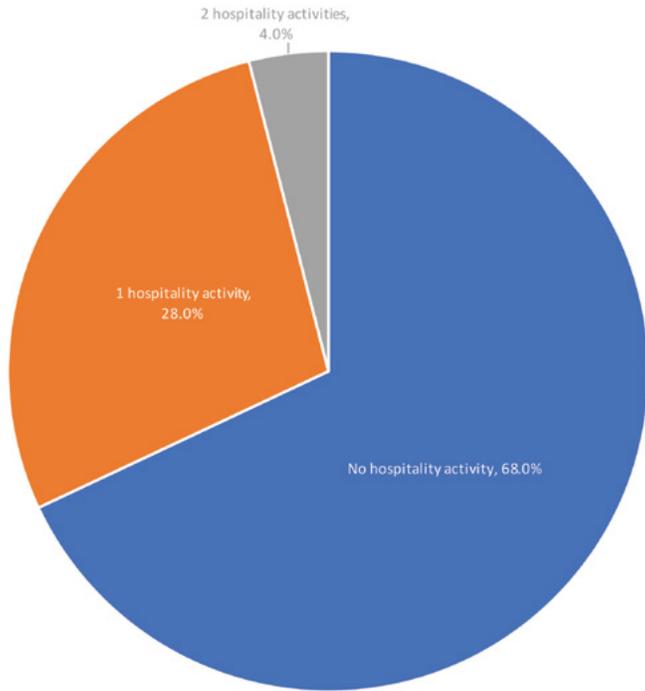
Figure 8 shows that about a quarter of the farms surveyed offered at least one educational activity. Only about 5% of farms offered more than one educational activity.

FIGURE 9. TYPES OF HOSPITALITY AND FOOD SERVICE ACTIVITIES (n=75)



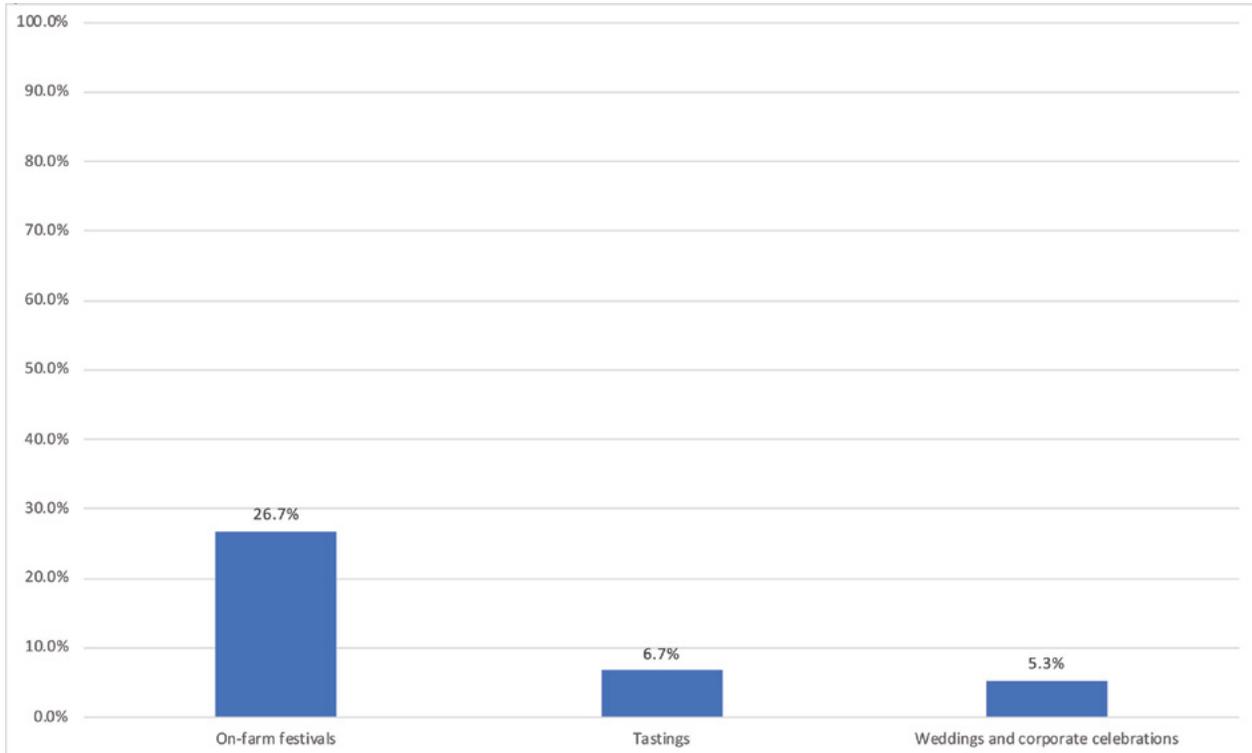
Farms that offered hospitality and food services activities primarily focused on renting space for events (16.0%) and offering food services (14.7%). Fewer farms offered farm stays/vacation rentals (4.0%) and Farm-to-Table dinners.

FIGURE 10. NUMBER OF FARMS HOSTING ON-FARM HOSPITALITY AND FOOD SERVICE EXPERIENCE ACTIVITIES (n=75)



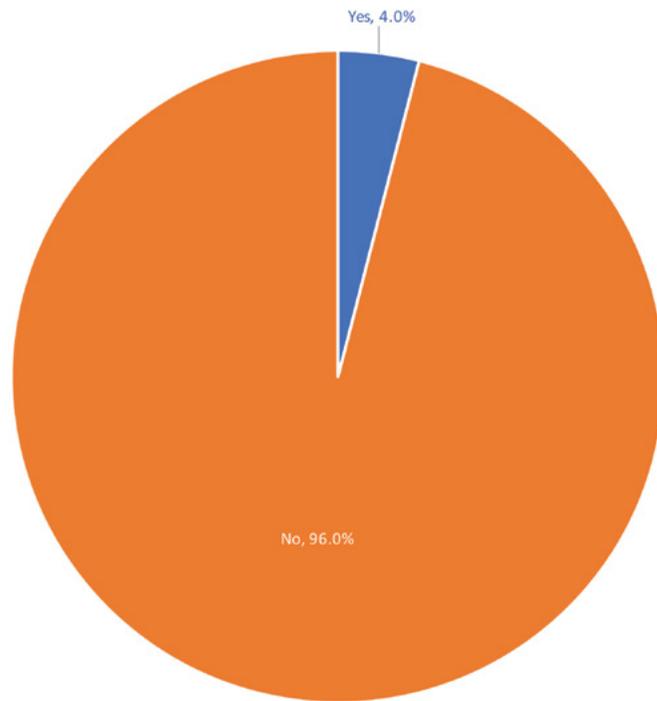
Marion County farms that offered hospitality and food service experience activities primarily hosted only one activity, as seen in Figure 10. However, about two-thirds of farms did not host any type of hospitality activity

FIGURE 11. TYPES OF ENTERTAINMENT EXPERIENCE ACTIVITIES OFFERED (n=75)



Farms typically offer on-farm festivals (26.7%), while tastings (6.7%), and weddings and corporate celebrations (5.4%) were offered by fewer farms, as shown in Figure 11.

FIGURE 12. OFF-FARM FARMERS MARKETS (n=75)



Only 4% of farms surveyed participated in off-farm farmers markets.

FIGURE 13. FARM LAND USE DISTRICT OF MARION COUNTY RESPONDENTS (n=75)

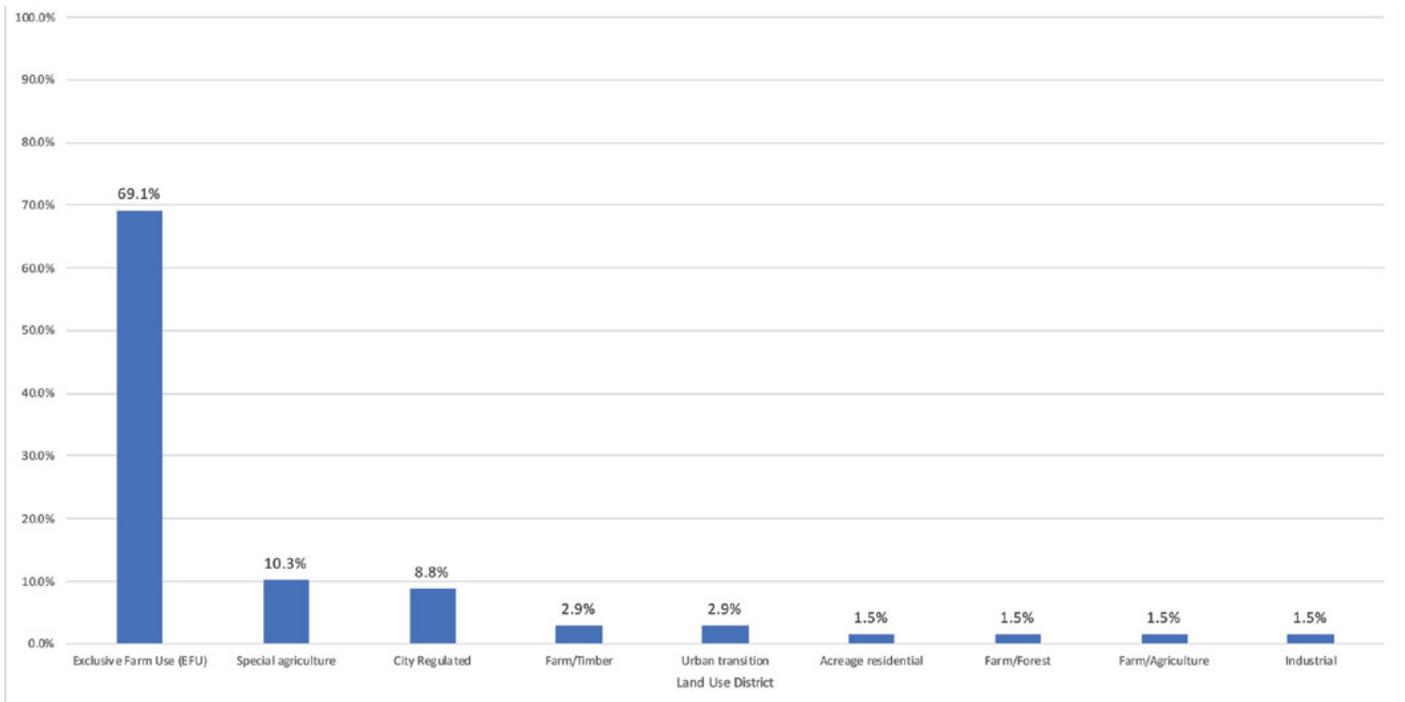


Figure 13 shows the land use district of respondent farms in the survey. A great majority (70%) of the farms surveyed were under the Exclusive Farm Use (EFU) district, while a smaller proportion were designated as Special Agriculture or under city regulations.

MAJOR FARM LAND USE DISTRICTS (FARM ZONES) IN MARION COUNTY²



Photo: Mary Stewart

EXCLUSIVE FARM USE

The purpose of the EFU (exclusive farm use) zone is to provide areas for continued practice of commercial agriculture. It is intended to be applied in those areas composed of tracts that are predominantly high-value farm soils as defined in OAR 660-033-0020(8). These areas are generally well suited for large-scale farming. It is also applied to small inclusions of tracts composed predominantly of non-high-value farm soils to avoid potential conflicts between commercial farming activities and the wider range of non-farm uses

otherwise allowed on non-high-value farmland. Moreover, to provide the needed protection within cohesive areas it is sometimes necessary to include incidental land unsuitable for farming and some pre-existing residential acreage. To encourage large-scale farm operations the EFU zone consolidates contiguous lands in the same ownership when required by a land use decision. It is not the intent in the EFU zone to create, through land divisions, small-scale farms. There are sufficient small parcels in the zone to accommodate those small-scale farm operations

that require high-value farm soils. To minimize impacts from potentially conflicting uses it is necessary to apply to non-farm uses the criteria and standards in OAR 660-033-0130 and in some cases more restrictive criteria are applied to ensure that adverse impacts are not created. The EFU zone is also intended to allow other uses that are compatible with agricultural activities, to protect forests, scenic resources and fish and wildlife habitat, and to maintain and improve the quality of air, water and land resources of the county.

²Information presented in this section is from <https://www.codepublishing.com/OR/MarionCounty/#!/MarionCounty17/MarionCounty17.html> on September 17, 2019.

SPECIALTY AGRICULTURE

The SA (special agriculture) zone is applied in areas characterized by small farm operations or areas with a mixture of good and poor farm soils where the existing land use pattern is a mixture of large and small farm units and some acreage home sites. The farm operations range widely in size and include grazing of livestock, orchards, grains and grasses, Christmas trees and specialty crops. The range in size of management units presents no significant conflicts and allows optimum resource production from areas with variable terrain and soils.

TIMBER CONSERVATION

The purpose of the TC (timber conservation) zone is to conserve forest lands by maintaining the forest land base and to protect the forest economy by making possible economically efficient forest practices that assure the continuous growing and harvesting of forest tree species as the leading use of forest land consistent with sound management of soil, air, water, and fish and wildlife resources and to provide for recreational opportunities and agriculture. The TC zone is intended to be applied in areas where the soils are predominantly forest site Class I through VI and where the existing land use pattern is predominantly large commercial forest ownerships managed

as commercial timber. The TC zone places primary emphasis on forest use but compatible uses are also allowed. These include uses to conserve soil, air and water quality and to provide for fish and wildlife resources, agriculture and recreational opportunities appropriate in a forest environment.

FARM/TIMBER

The FT (farm/timber) zone is intended to be applied in areas where the soils are suitable for farm or forest uses as defined in the Forest Lands Goal, and where the existing land use pattern is a mixture of agricultural ownerships, forest management units and some acreage home sites. The farm operations range widely in size and often include an area managed as a woodlot or a small timber tract. The forest management units range from small timber tracts managed by the owner resident to commercial forest ownerships managed as commercial timber. The mixture of farm and forest use and the range in size of management units present no significant conflicts and allow optimum resource production from areas with variable terrain and soils. These areas are a transition between the large farm operations in the EFU zones and the large, almost exclusively commercial timber tracts in the TC zones. The FT zone is also intended to allow other uses that are compatible with agricultural

activities, to protect forests, scenic resources and fish and wildlife habitat, and to maintain and improve the quality of air, water and land resources of the county. This zone allows the flexibility in management needed to obtain maximum resource production for these lands. It places equal emphasis on farming and timber production.

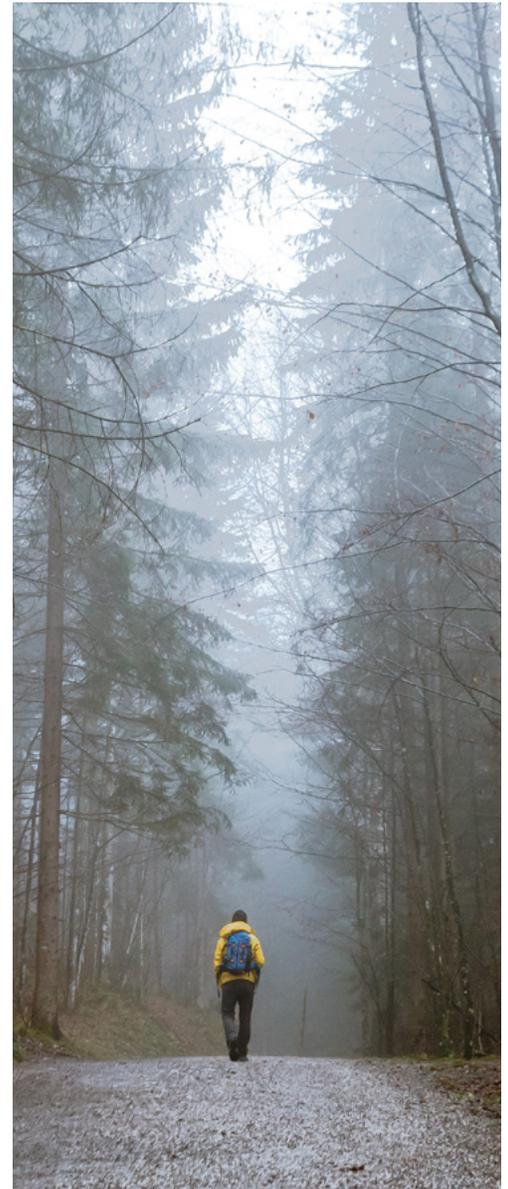


Photo by Gabriela Palai from Pexels

HOW IS AGRITOURISM A BENEFIT AND A CHALLENGE?

BENEFIT

Agritourism blends the agriculture and tourism industries, and is a business enterprise that shows promise as a way to keep family farms viable.

Agritourism benefits farmers, value-added³ producers, consumers and communities by:

- Diversifying farms. Increasing profit for farms, value-added operations and their nearby communities.
- Providing income streams for family farm members who might otherwise have to work off the farm. Keeping the younger farm generation on the farm.
- Providing a larger draw for long distance visitor travel. Guiding visitors off the beaten track.
- Providing more to do in one place. Causing visitors to linger longer.
- Educating consumers about local farm products, and the positive social, economic and environmental impact of farming.

CHALLENGE

On the other hand, industry growth presents challenges:

- Competition for limited resources.
- Collaboration and management inefficiencies.
- Long-term sustainability.
- Impacts need measurement to assess return on investment.
- Not always compatible with existing land use regulations.

³Value-added enterprises include but are not limited to: agriculture processing facilities – food, fiber and plant packing and mills, wineries, cideries, and botanical gardens.

Information presented in this section is adapted from [University of Vermont Extension website](#).

LOCAL SUPPORT FOR AGRITOURISM DEVELOPMENT



Photo: Mary Stewart

A collaborative of OSU Extension's Agritourism Program in Marion County, Marion County 4-H and Extension Service District, Marion County Community Services, Planning and GIS Departments, Travel Salem, agritourism nonprofit organizations, legislators, the Governor's staff, and local agricultural producers play a part in helping the industry grow in a thoughtful and strategic manner.

OSU Extension's work plan includes three thrusts:

1. Research to understand the scope of the industry, and to identify best practices for success.
2. Industry engagement efforts to help farmers connect and build relationships with each other, refer business to each other, and collaborate on common problems and opportunities.
3. Education programs that build skills for success.

Examples of three Marion County Extension efforts include:

- Participation in the USDA's AgMRC research project which is providing new and meaningful information on best practices of the agritourism industry.
- Encouraging farmers and value-added operators to collaborate.

Advising the [Marion Farm Loop](#) community of local agritourism operators who organized in 2017. The farm group continues to evolve with new farm stop members and high-tech mapping provided by Marion County GIS.

Connecting visitors and consumers to local farms and value-added operations with a public-facing monthly newsletter [Visit Local Farms News](#).

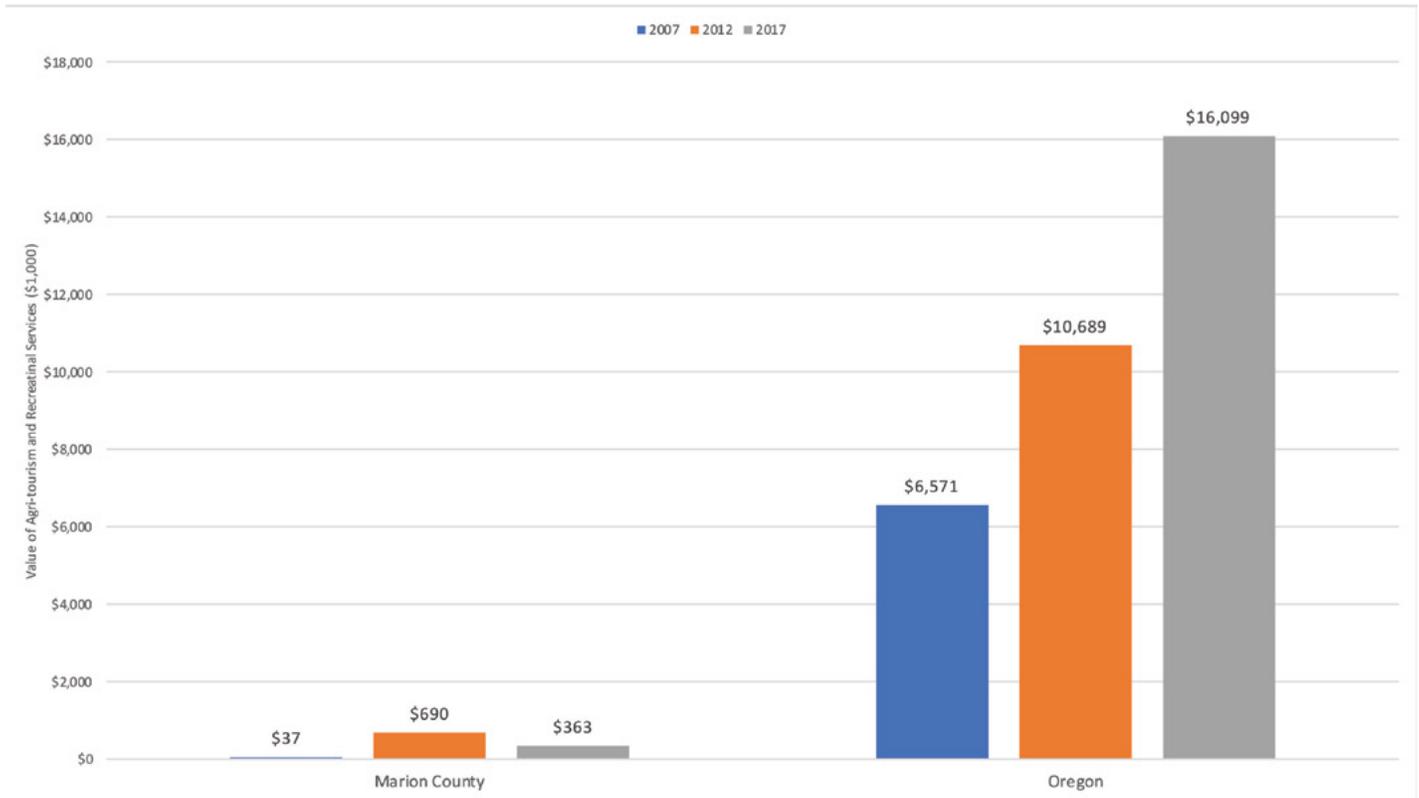
- Conducting educational training programs, such as the Farm Image

and Public Relations Workshop, and the 2019 Agri-Eco tourism Conference, which educated agritourism operators from around the Willamette Valley. Evaluations from these trainings showed a significant increase in knowledge. New publications and a video were written and published, including [Questions Planners may anticipate regarding the Agritourism Industry's Farm Direct Sales and Other Farm-Based Activities](#); and [How Instagram can help Direct Traffic to your Agritourism Operation](#).

THE VALUE OF AGRITOURISM

IN MARION COUNTY AND OREGON - USDA NASS AG CENSUS

FIGURE 14. VALUE OF AGRITOURISM AND RECREATION IN MARION COUNTY AND OREGON, 2007, 2012 AND 2017



This chart shows a comparison of the value of agritourism over three agriculture census periods. In 2017, there were changes to the questions that make direct comparisons between 2012 and 2017 not analogous.

It is important to note that the Census of Agriculture measures agritourism as the value of products for human consumption only and does not measure agritourism as the value of non-food agricultural products such as Christmas

trees or nursery stock. As such, the picture of the value of agritourism for Oregon and Marion County is incomplete when using just these reports from the census.

Below is the text from the NASS Appendix that provides more detail about the change in measurement.

“Value of food sold directly to consumers. Data represent the value of edible products, including value added

products, produced and sold for human consumption directly to consumers at farmers markets, on-farm stores or farm stands, roadside stands or stores, u-pick, CSA (Community Supported Agriculture), online marketplaces, etc.

Data are not directly comparable to 2012. In 2012 Value of food sold directly to individuals for human consumption excluded value added sales.”

THE VALUE OF TOURISM IN MARION COUNTY



Photo by Travel Salem

In 2018, direct visitor-related spending in Marion County was \$425.8 million, up 2.5% over 2017. An additional \$4.4 million was generated in lodging tax revenue. According to the Dean Runyan Study⁴, Economic Impact of Tourism, 2018, which is conducted on behalf of Travel Oregon).

Measurement of the financial impact of agritourism is not broken out in this research.

GENERAL FACTORS AFFECT THE VIABILITY OF THE AGRITOURISM INDUSTRY



Photo by Bauman's Farm and Garden

Several factors affect the viability of the agritourism industry. The primary indicators for growth include:

- The growth in the overall, agriculture and agritourism economy.
- The growing public interest in farms, food systems and culinary activities.
- The popularity of regional wines.

⁴Dean Runyan Study <https://industry.traveloregon.com/resources/research/oregon-travel-impacts-1991-2011-dean-runyan-associates/>

LAND USE ON AGRICULTURAL LANDS



Photo by Gregory Dean Specht

Marion County has a comprehensive plan⁵ that addresses land use on farmland.

Within that plan, the County states, “Protection and preservation of farmland is primarily for the purpose of maintaining the soil resource and farm industry as a basis for food and fiber production now and in the future. Because of its dependence on the land resource, farming is sensitive to the effects of land use change and intensity...the division of land into small parcels and the presence of non-farm

activities can drastically affect farm operations. Therefore, to achieve the goal of protecting and preserving the agricultural industry, non-farm activities in rural farm areas of Marion County must be strictly controlled.”

Marion County Planners advise farmers and value-added operators who wish to establish or expand their operation with farm direct sales and other agritourism. Planners work to align land use changes with existing regulations. They refer to the study mentioned above, as well as Oregon’s Right to Farm Law which

allows certain farm uses outright, and the list of non-farm uses allowed on farmland in Oregon’s statutes.

The more educated farmers, value added operators and the planners are about the agritourism industry, and the more opportunity for open and collaborative discussion, the better chance agritourism has for thoughtful and strategic growth.

⁵Marion County Comprehensive Plan <http://www.co.marion.or.us/pw/planning/zoning/documents/comprehensiveplan/aglands.pdf>

FUTURE PROJECTS THAT WILL PROVIDE MORE INFORMATION

1. NATIONAL AGRITOURISM SURVEY,
Critical Success Factors for Small and Medium-Sized Farms with Direct Sales and Agritourism

A national survey of agritourism operators is planned in fall 2019 and winter 2020 to gather information about best practices, as well as the operating characteristics of the industry.

Farmers, value-added operators, agricultural service providers and other stakeholders have guided the design of the project.

Farmers and value-added producers who are conducting direct sales and other agritourism as part of their business mix, have expressed a need for more guidance and support pertaining to best management practices. Input from

tourism departments and other service providers reinforces that interest. Results of the survey responses will be available in 2021.

For more information, contact:
Lisa.chase@uvm.edu

2. INTERNATIONAL WORKSHOP ON AGRITOURISM

Burlington, Vermont

October 27-29, 2020

Visit www.agritourismworkshop.com



Partial funding for this study provided by the Agriculture Marketing Resource Center (AgMRC), located at Iowa State University, www.agmrc.org. AgMRC is a national website dedicated to providing information to producers and service providers on value-added agriculture businesses.



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Marion County

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