

Agritourism in New York: Management and Operations

by

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Introduction

Many farm businesses in New York State today are opening their doors to visitors. Farm stands, wineries, maple syrup and honey producers, greenhouses and plant nurseries, and Christmas tree farms are just a few of the many types of farm-based businesses that are open to, and attract, visitors. Documenting the status of these agritourism businesses involves study of the management and marketing strategies used by business owners as well as the economic impacts provided by these businesses around the state.

In order to provide agritourism business owners across the state with up-to-date information, NY Sea Grant and Cornell University's Farming Alternatives Program, in conjunction with the Cornell University Statewide Committee on Community and Economic Vitality Tourism Work Group, conducted a two-part study of agritourism business owners and their customers in New York State in 1999 and 2000. Funding for this research was provided by the United States Department of Agriculture through Cornell University's Research and Extension Integration Grants Program. The results from this study are presented in this fact sheet and in "Agritourism in New York: a Market Analysis."

Methods

The 1999 New York State Agritourism Business Study consisted of two components: a customer survey and a business owner survey. The customer survey was conducted in 1999 with the assistance of six agritourism business owners in New York State. Business owners were requested to ask their customers to complete a short survey. A total of 299 customer surveys were completed and analyzed.

In 2000, a survey of agritourism business owners was conducted. A mailing list of 2,416 agriculture-related businesses open to the public was generated with assistance from agriculture and tourism agencies and organizations across New York State. The size of this initial mailing list is likely conservative since businesses not included in agency mailing lists may have been excluded. A systematic random sample of 2,000 businesses was generated from this initial mailing list. Farm business owners in this sample were sent surveys by mail and asked to report on their business activities for the calendar year 1999. A reminder postcard and follow-up survey were mailed to non-respondents. After businesses with undeliverable addresses and businesses not classified as agritourism by their owners were removed from this sample, a qualified sample of 1,661 businesses remained. From this qualified sample, 9.7% of the surveys were returned by owners who did not wish to participate in the study, 51.5% were not returned, and 38.8% (645 surveys) were completed and used in this study.

Table 1. Types of agritourism businesses sampled in New York State and the estimated total number of each type in New York State in 1999.

| Business type | Number of respondents | Percentage of respondents | Estimated total number in NYS |
|---------------------------------|-----------------------|---------------------------|-------------------------------|
| Farm stands | 241 | 37.4% | 781 |
| Christmas tree farms/sales | 77 | 11.9 | 248 |
| U-pick operations | 62 | 9.6 | 200 |
| Maple products production/sales | 60 | 9.3 | 194 |
| Greenhouses/plant nurseries | 59 | 9.2 | 192 |
| Wineries | 40 | 6.2 | 129 |
| Livestock breeding/sales* | 29 | 4.5 | 94 |
| Farm-based B&Bs** | 18 | 2.8 | 58 |
| Others*** | 59 | 9.1 | 191 |
| TOTAL | 645 | 100.0% | 2,087 |

* “Livestock breeding/sales” includes cattle, horse, sheep, goats, pigs, exotic animals, poultry, and fish.

** “Farm-based B&Bs” includes B&Bs on both currently operating as well as historic farms.

*** “Others” includes herb and perennial farms, petting zoos, community supported agriculture farms, farm-related museums, farm tour operators, horse riding stables, honey production and sales, cider mills and sales, cheese production and sales, campgrounds, corn mazes, food processors, breweries and hops farms, hunting preserves, and Halloween-related businesses.

Businesses were defined as “agritourism businesses” if responding owners indicated on the survey that they were a farm-based business open to visitors. Many farm business owners did *not* consider their businesses to be agritourism businesses (e.g., farm stands that cater to local residents only) and were not included in the study. However, the definition of “agritourism business” used in this study (i.e., a farm-based business that is open to visitors) is broad. Businesses such as CSAs (community supported agriculture farms) and greenhouses that obtain much of their income from local residents were included in the sample because they offer tours, educational programs, and products to visitors. Estimates found throughout this report were calculated from this estimated number of agritourism businesses. Percentages included are based on the number of responses to each individual question (n).

New York's agritourism industry

New York State’s agritourism industry consists of an estimated 2,087 businesses (Table 1) which brought in an estimated total gross income of \$210,873,600 for their agritourism components in 1999. (Note: income estimates include income from both residents and visitors.) However, after deducting business expenses, the total estimated net profit received by these businesses was \$25,768,800.

Many different types of businesses comprise New York’s agritourism industry. In order to identify which types of businesses exist, business owners were asked to categorize their business *primarily* (i.e., the business type from which *most* of their agritourism income came) as one of the following: farm stand, greenhouse and/or nursery, u-pick fruit and/or vegetable operation, Christmas tree farm and/or sales, winery and/or vineyard, farm-stay bed and breakfast, or “other” type of agritourism business. Because of the abundance of livestock breeding and sales farms (originally categorized as “other” by business owners), this type of agritourism business was separated from the “other” category. In addition, several country store and gift shop businesses, also categorized as “other” by business owners, were added to the “farm stand” category because of similarities in retail operations and management. Table 1 lists the estimated number and percentage of each type of agritourism business existing in New York State.

The gross income, gross expenses, and net profit of businesses varied greatly by the type of business (Table 2). Greenhouses and plant nurseries on average made the highest profits from the agritourism components of their business, while owners of livestock breeding and/or sales businesses made the lowest average profit. While the average agritourism business in New York State did make a profit in 1999, 25% of the responding agritourism businesses did not (i.e., their costs were higher than their income). Of the businesses that did not make a profit in 1999, 29% were farm stands, 15% were Christmas tree farms, and 12% were maple syrup producers.

Table 2. 1999 gross incomes, gross expenses, and net profits for the agritourism components of businesses sampled, listed in increasing order of average net profits by business type (n = 399).

| Business type | Average Gross Income* | Average Gross Expenses | Average Net Profit |
|---------------------------------|-----------------------|------------------------|--------------------|
| Greenhouses/plant nurseries | \$158,112 | \$136,926 | \$25,669 |
| Farm stands | 108,267 | 95,872 | 15,221 |
| U-pick operations | 53,592 | 41,709 | 12,006 |
| Other | 78,805 | 74,589 | 11,479 |
| Christmas tree farm/sales | 29,235 | 23,298 | 8,308 |
| Maple products production/sales | 36,816 | 31,653 | 7,074 |
| Farm-based B&Bs | 36,455 | 31,017 | 4,110 |
| Wineries | 381,413 | 340,335 | 3,604 |
| Livestock breeding/sales | 30,694 | 31,939 | 860 |
| ALL BUSINESSES COMBINED | \$101,041 | \$88,499 | \$12,347 |

*“Average gross income” includes income from sales to both local residents and visitors.

New York's agritourism industry by region

The New York State Department of Economic Development recognizes eleven tourism regions in New York State (Figure 1). Results from this survey have been broken down into these regions. Table 3 lists the estimated number of agritourism businesses within each region as well as the estimated income to agritourism businesses by region. Agritourism businesses within the Finger Lakes Region received over an estimated \$66 million in income in 1999, the highest gross income and number of businesses of all regions in New York State.

Knowing which types of agritourism businesses exist in each region can be useful to business owners interested in expanding their business. Table 4 lists the most frequently found types of businesses in each tourism region. To avoid competition with other businesses within a specific region, business owners seeking to expand their businesses should use this table as an *indication* of which businesses are already frequently found. (Note: Table 4 does not identify specifically where, within each region, competing businesses are located.)

Figure 1. New York State Department of Economic Development tourism regions.

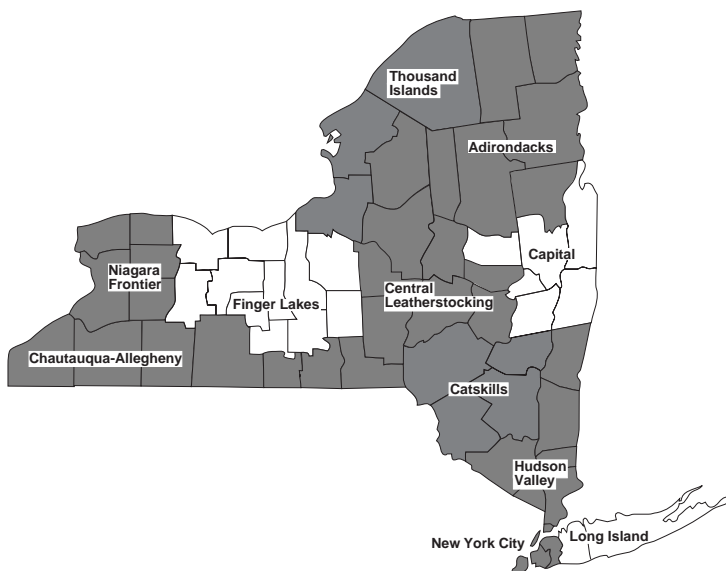


Table 3. A breakdown of responding agritourism businesses according to New York State Department of Economic Development tourism regions (n = 645).

| Tourism region | Number of respondents | Percentage of all respondents | Total estimated number of agritourism businesses | Total estimated gross income of agritourism businesses in region |
|-------------------------|-----------------------|-------------------------------|--|--|
| Adirondacks | 51 | 7.9% | 165 | \$7,817,200 |
| Capital | 64 | 9.9 | 207 | 14,281,200 |
| Catskills | 47 | 7.3 | 152 | 15,332,400 |
| Chautauqua-Allegheny | 42 | 6.5 | 136 | 8,573,700 |
| Central Leatherstocking | 73 | 11.3 | 236 | 16,464,200 |
| Finger Lakes | 174 | 27.0 | 563 | 66,250,100 |
| Hudson Valley | 62 | 9.6 | 201 | 21,897,400 |
| Long Island | 32 | 5.0 | 104 | 34,691,700 |
| Niagara Frontier | 63 | 9.8 | 204 | 21,130,500 |
| New York City* | 1 | 0.1 | 2 | — |
| Thousand Islands | 36 | 5.6% | 117 | 7,444,700 |

*The total estimated income to the New York City region could not be determined because of the region's small sample size.

Management and operations

Business owners were asked to identify all components of their *entire* farm business. These components included a range of operations, services, and attractions such as offering farm tours, producing cider, leasing farm property, selling fruits and vegetables, and growing field crops. The most common farm business components are listed for each major agritourism business type in Table 5. Components *not* commonly used include cheese production and/or sales, miniature and/or 18-hole golf, property leases, for-fee fishing, and campgrounds. The income from components developed for visitors (i.e., agritourism components) comprised an average 43% of the *entire* farm business income of respondents (n = 553). Businesses were generally most successful (i.e., had the greatest average net profits) when income from these agritourism components comprised between 25% and 75% of the entire farm business income.

While only 4% of respondents indicated that they charge an admission fee for their business, many owners do charge a fee for specific activities on their farms. Agritourism activities frequently charged for include for-fee hunting and fishing, hayrides and/or sleigh rides, educational programs and/or demonstrations, farm or business tours, petting zoos, and viewing historic farm buildings. Owners may choose not to charge visitors for activities for several reasons, including that the activity is offered as a community service rather than as a profit-making enterprise, the activity is offered to attract visitors to a farm retail store, or because of the reduced liability resulting from not charging a fee.

Most respondents decided to open their agritourism businesses to increase the profitability of their existing farm business (82% of respondents; n = 593). Respondents also started their agritourism businesses because they enjoy working with people (42%), to teach others about farm heritage, farming, or their specific business or product (39%), to provide employment for their family members (18%), or for other reasons (12%) including generating income, providing a community service, or selling a specific product.

While 30% of respondents (n = 635) indicated that their businesses are open during all four seasons or portions of all seasons, the majority of agritourism businesses are open only during specific seasons. Most are open during the fall (78%) and summer (76%), with fewer open during the spring (60%) and winter (43%). Twenty-five percent of respondents (n = 547) indicated that October is their busiest month, followed by December (15% of respondents), July (13%), and August (12%). While the average agritourism business received 7,099 customers in 1999 (n = 409), customer visitation ranged from 0 customers to 258,000.

With regard to employees, the average agritourism business had three family-member employees, six employees who were not family members, and one private contractor in 1999 (n = 607). Twenty-four percent of employees work 10 hours or less per week, 22% work 11 to 20 hours per week, 16% work 21 to 30 hours, and 38% work 31 hours or more (n = 480).

Insurance and liability

Adequate insurance coverage was of high concern to many agritourism business owners (Table 6). While 50% of respondents (n = 624) indicated that they carry general comprehensive business insurance, 30% carry homeowner's policies, 16% have homeowner's insurance with a small business rider, and 11% have some "other" type of policy (e.g., a farm owner policy). Several respondents indicated that they have special riders for horseback riding, hayrides, or their u-pick operations. While most businesses have liability insurance, the cost of liability insurance remains high. A number of business owners indicated that they obtain their liability insurance through agriculture organizations or other organizations, most likely because of the lower group rates.

Liability continues to be a major concern of many agritourism business owners. Eighty-four percent of respondents indicated that it is a concern (n = 619). To protect themselves from liability, 90% of respondents (n = 614) have purchased liability insurance, 71% regularly make any needed repairs, and 41% have added safety precautions. Less frequently used but important liability protection measures include conducting a risk analysis of the business (11% of respondents use this measure), turning the businesses into limited liability partnership or corporation (10%), and having visitors sign a disclaimer (4%). Other liability protection measures used by respondents include posting hazard or "posted" signs, carefully managing and monitoring visitor activities, training staff about safety concerns, not charging visitors for visiting the farm, and not permitting potentially dangerous activities (e.g., cutting down Christmas trees or using a ladder in an apple orchard). While certain actions such as not charging an admission fee and limiting the activities of visitors *might* decrease the liability of business owners, these actions do not remove all liability responsibilities. Owners are still responsible for maintaining a safe environment for visitors at all times.

The combination of adequate liability insurance, having an insurance agent conduct a thorough risk analysis of a business, adding safety precautions and signs, and regularly making all needed repairs are the best ways to reduce business liability. Owners should also review the type of ownership they have for their business (e.g., partnership, sole proprietorship, corporation) with their lawyers and accountants to identify which ownership structure would provide them with the best protection from liability.

Table 4. The common agritourism business types for each New York State Department of Economic Development tourism region. Business types comprising less than 10% of each region's total number of agritourism businesses are not included (n = 645).

| Region | Business type | Percentage of business type in region |
|-------------------------|---------------------------|---------------------------------------|
| Adirondacks | Maple production/sales | 35.3% |
| | Farm stand | 29.4 |
| | Christmas tree farm/sales | 15.7 |
| Capital | Farm stand | 51.6 |
| | Christmas tree farm/sales | 14.1 |
| Catskills | Farm stand | 31.9 |
| | Other | 12.8 |
| | Christmas tree farm/sales | 10.6 |
| | U-pick operation | 10.6 |
| Chautauqua-Allegheny | Farm stand | 31.0 |
| | Greenhouse/nursery | 14.3 |
| | Maple production/sales | 14.3 |
| | Other | 14.3 |
| | U-pick operation | 11.9 |
| Central Leatherstocking | Farm stand | 41.1 |
| | Maple production/sales | 15.1 |
| | Other | 13.7 |
| Finger Lakes | Farm stand | 31.6 |
| | Christmas tree farm/sales | 13.8 |
| | Winery | 13.8 |
| | U-pick operation | 11.5 |
| Hudson Valley | Farm stand | 30.7 |
| | Christmas tree farm/sales | 22.6 |
| | Greenhouse/nursery | 12.9 |
| | Livestock breeding/sales | 11.3 |
| Long Island* | Farm stand | 57.6 |
| | Winery | 15.2 |
| Niagara Frontier | Farm stand | 46.0 |
| | Greenhouse/nursery | 14.3 |
| | Maple production/sales | 12.7 |
| Thousand Islands | Farm stand | 36.1 |
| | U-pick operation | 16.7 |
| | Other | 13.9 |
| | Christmas tree farm/sales | 11.1% |

*Includes the information from the one respondent from New York City.

Table 5. Common business components used by agritourism business owners in New York State in 1999 (n = 645). The percentage of businesses offering each business component are given in parentheses. Components comprising less than 10% of each business type are not listed.

| Business type | Frequently used business components |
|---------------------------------|---|
| Farm stand | Fruit and/or vegetable sales (91%), homemade-food sales (39%), u-pick operation (35%), craft sales (33%), greenhouse/nursery (30%), orchard (29%), field crop production (29%), farm tours (24%), cider (19%), herb production (18%), Christmas tree farm/sales (18%), educational programs and/or demonstrations (16%), hayrides/sleighrides (16%), honey production/sales (14%), maple production/sales (12%), petting zoo (12%), meat sales (11%), restaurant/snack bar (11%). |
| Christmas tree farm/sales | Timber production (21%), farm tours (16%), educational programs and/or demonstrations (13%), hayrides/sleighrides (12%), farm stand/country store (10%), greenhouse/nursery (10%). |
| U-pick operations | Fruit and/or vegetable sales (72%), farm stand/country store (63%), orchard (39%), homemade-food sales (34%), hayrides/sleighrides (29%), craft sales (24%), field crop production (24%), farm tours (24%), educational programs and/or demonstrations (21%), greenhouse/nursery (19%), petting zoo (16%), historic buildings (14%), cider (14%), vineyard (13%), Christmas tree farm/sales (11%). |
| Maple products production/sales | Timber sales (18%), farm tours (18%), educational programs and/or demonstrations (17%), field crop production (13%), farm stand/country store (12%), dairy production (12%). |
| Greenhouses/plant nurseries | Farm stand/country store (46%), fruit and/or vegetable sales (36%), herb production (32%), educational programs/demonstrations (22%), Christmas tree farm/sales (20%), field crop production (19%), craft sales (14%), u-pick operation (12%), farm tours (10%). |
| Wineries | Vineyard (85%), farm tour (15%), restaurant/snack bar (12%), historic buildings (12%). |
| Livestock breeding and/or sales | Meat sales (55%), educational programs and demonstrations (48%), livestock breeding (48%), farm tours (41%), dairy production (31%), field crop production (24%), exotic livestock breeding and/or sales (21%). |
| Farm-based B&Bs | Fee hunting (28%), farm tours (28%), dairy production (17%), field crop production (17%), wool and woolen goods sales (17%), hayrides/sleighrides (17%), livestock breeding and/or sales (17%). |
| Other | Farm tours (53%), educational programs and/or demonstrations (36%), field crop production (31%), farm stand/country store (24%), herb production (24%), petting zoo (22%), meat sales (20%), honey production/sales (20%), hayrides (19%), historic buildings (19%), homemade-food sales (19%), fruit and/or vegetable sales (15%), craft sales (15%), greenhouse/nursery (15%), u-pick operation (14%), museum exhibits (14%). |

Other business owner concerns

Business owners expressed many concerns about different aspects of their businesses and the agriculture industry as a whole (Table 6). While liability was the most commonly mentioned concern, other frequently mentioned concerns included marketing, promotion, and advertising, labor, taxes (i.e., income, sales, property, school, and excise taxes), making a profit, and government regulations. Concerns about competition with other small businesses, large retailers, and foreign suppliers combined were mentioned by 11.5% of respondents. (Note: these types of competition are listed separately in table 6.)

Labor concerns were identified as the third highest concern of agritourism business owners (16.4%; Table 6). Many business owners indicated that they were having difficulty finding dependable staff, largely because of the seasonal nature of their businesses, and affording employee wages. Most agritourism businesses depend on a combination of family members, non-family employees, and private contractors for employees. Several owners of CSAs (community supported agriculture farms) indicated that labor concerns were less of an issue since their CSA members now help with picking crops.

Many agritourism business owners indicated that the large number and types of government regulations were making it increasingly more difficult to manage their business and make a profit. For example, some Christmas tree growers mentioned that the regulation that prohibits the use of live Christmas trees in public buildings negatively affects their potential income. Several wine producers indicated that regulations governing interstate transport of wines prevented them from selling wines outside New York State.

In addition to these specific concerns, 13.8% of respondents indicated that government regulations in general were of concern to them.

The future of New York's agritourism businesses

Planning is an important part of any business. Twenty-four percent of survey respondents (n = 633) indicated that they have a current, written business plan for their entire farm business. Of these respondents (n = 141), 67% indicated that their plan includes agritourism considerations.

Many agritourism businesses depend on diversification for their continued growth. When asked what management changes they expect to make within the next five years, 64% of respondents (n = 581) indicated that they plan on expanding or diversifying their business or product lines. In addition, many business owners also plan to invest more funding in their business (34%), maintain their current income level (24%), hire more employees (21%), or incorporate their business (8%). Seven percent of respondents indicated that they may have to go out of business within five years.

Many respondents likewise plan on making physical changes to their business over the next five years. Adding more parking (38% of respondents; n = 404) and enlarging the existing retail store (38%) are the plans of many business owners. In addition, 28% of respondents plan on adding a new retail store, 26% plan on adding or enlarging the rest rooms, 13% intend to build hiking trails, and 27% mentioned other changes such as enlarging other aspects of their business, improving signage, adding access for people with disabilities, or renovating existing facilities.

Business owners planning on making future changes to their business may choose to consider the facilities and services most requested by visitors in 1999. While rest rooms were the most highly requested facilities (70% of respondents indicated that customers requested this facility; n = 429), other facilities and services such as guided or self-guided farm and business tours (54%), tourism information about the area (44%), snack bars or restaurants (30%), and gift shops (24%) were also highly requested. The location of overnight accommodations, picnic areas, water fountains, and horseback riding stables were also requested. Services requested include wine and product tastings, as well as credit card use.

Seventy-two percent of the agritourism customers surveyed (n = 267) indicated that the friendliness of the staff working at an attraction was most important to them, followed by the scenic appearance of the attraction (71%). When choosing an attraction to visit, the presence of activities at the attraction itself were important to 58% of the customers surveyed. Other factors of importance to customers include the presence of farm animals (33% of customers), the presence of barns or other historic buildings (32%), and the presence of a restaurant or snack bar (24%). Factors that were less important to visitors when choosing an attraction included the presence of a souvenir shop or other store (16%) and the proximity of the attraction to other attractions, hotels, and restaurants (16%).

Customers also were asked to indicate what activities they would like to try in the future. Table 7 lists the different activities in which customers indicated that they would be interested in participating. Customers indicated the most interest in sampling local foods, produce, and wines.

Table 6. Agritourism business owner concerns. The concerns below are the “top three” concerns of respondents (n = 492) -- not their only concerns. Concerns mentioned by less than 1.0% of respondents are not included on this list.

| Business owner concerns | Percentage of respondents listing concern |
|---|---|
| Top ten concerns: | |
| Liability and liability insurance concerns | 26.1% |
| Marketing, promotion, and advertising concerns and costs | 17.0 |
| Labor costs, finding reliable labor, and other labor concerns | 16.4 |
| Government regulations | 13.8 |
| Taxes | 13.0 |
| Maintaining a profit margin | 12.6 |
| Attracting more customers | 9.3 |
| Weather | 8.5 |
| Producing quality products and other production concerns | 7.1 |
| Insurance coverage and costs | 5.8% |

Other concerns (indicated by between 5% and 1% of respondents): Preserving open space and farm land; Competition with other small businesses; Educating the public about agriculture; High fuel prices; Visitor safety; Low prices for products; Insects and crop diseases; Societal changes that influence customer base; Competition with large retailers; Competition with foreign suppliers; Costs of operating an agritourism business; Traffic flow problems near business; Obtaining financing; Time constraints; Increasing product sales; Signage costs, regulations, and other concerns; Customer satisfaction and enjoyment; Cider pasteurization regulations; How to expand my business; Insufficient government support; Maintaining a customer base; Obtaining fair prices for products; Competition of live Christmas trees with artificial; Regulations concerning the interstate shipping of wine; Meeting customer demands; Need for more agritourism promotion by the government.

Table 7. Activities in which visitors indicated they would be interested in participating in the future (n = 267).

| Activities | Percentage of customers indicating an interest in the listed activity |
|----------------------------------|---|
| Sampling local foods and produce | 47.2% |
| Sampling wines at a winery | 44.2 |
| Picking fruit or vegetables | 43.4 |
| Horseback riding | 36.3 |
| Going on a hayride | 34.1 |
| Visiting a petting zoo | 32.2 |
| Staying at a farm-stay B&B | 32.2 |
| Touring a farm | 25.5 |
| Fishing in a farm pond | 20.6 |
| Learning more about farm history | 17.6% |

Conclusion

Agritourism businesses contribute a great deal to the economy of New York State and its tourism industry. In 1999, the gross income for the agritourism components of farm-based businesses was estimated at nearly \$211 million. However, increasing business expenses, government regulations, and competition from other retailers are making it more difficult for agritourism business owners to stay in business. Nearly 7% of survey respondents (n = 581) indicated that they were considering going out of business in the next five years. Twenty-five percent of respondents (n = 399) indicated that their agritourism business costs exceeded their agritourism business income in 1999.

Innovative strategies for agritourism business management need to be considered to maintain and create successful businesses. Alternatives such as obtaining insurance through farm-related organizations can reduce insurance costs. However, alternatives are obviously not suited for every business. Understanding visitor needs and offering unique services and products to meet those needs are critical to the success of all businesses. In addition, careful study of who visitors are and where they are coming from, as well as existing competitors, are essential. Working through agriculture-related organizations to bring regulation concerns to the attention of legislators is also needed. By working together with statewide, regional, and county tourism promoters and existing agricultural organizations, agritourism business owners can help agritourism reach its full potential in New York State.

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