2012 Wisconsin Agritourism Survey Report

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Executive Summary:

The 2012 Wisconsin Agritourism Study was conducted as a partnership between the Wisconsin Agricultural Tourism Association (WATA), the University of Wisconsin-Extension Center for Community and Economic Development and County University of Wisconsin-Extension Cooperative Extension offices. The study was designed to: provide agritourism businesses with customer information to improve marketing to include customer origin, motivations for visits and spending, customer tastes and preferences; estimate consumer expenditure potential and economic impact of the food based agritourism industry in Wisconsin; determine the relative size and composition of food based agritourism in Wisconsin.

Research Design

In order to reduce measurement error (error caused by poorly worded questions or other aspects of questionnaire construction) the survey tool was designed with significant peer review from a group of Extension colleagues and agritourism business owners involved in the Wisconsin Agritourism Association. The survey structure and several of the questions were based on tested consumer surveys used in Colorado and Iowa. In addition, the tool was tested for reliability by colleagues on the review team and among a group of non-tourism affiliated citizens.

The survey was developed as an internet-based questionnaire which was disseminated via a web link, directly through email, or by email from a business who volunteered to send it to their customers. During the 30 day study period, the survey was emailed to an estimated 16,827 customers of agritourism businesses in Wisconsin. This number is approximate since many of the sixteen businesses that voluntarily forwarded the internet survey via email or social media could not accurately estimate how many people received it through these means. The survey was also emailed directly to customers who visited an agritourism business on the Wisconsin Autumn Harvest Trail in 2010 and provided an email contact. The survey received an exemption for human subjects review by the Human Subjects Review Board of the University of Wisconsin.

While efforts were made to reduce error, the survey design was not free of coverage or non-response error. Because the survey was assessed via the internet, the sample includes data from those agritourists that use the internet and were willing to supply the agritourism business with their email. It is unknown if this group differs significantly from the broader population of agritourists or tourists. While mixed mode surveys have been demonstrated to reduce non-response error, a mixed mode survey was not possible given budget constraints of the project.

There were 827 responses to the survey for a response rate of approximately 4.9%. Response rates were also calculated for each of the participating businesses. Response rates varied significantly by business, ranging from 2% to 34%.

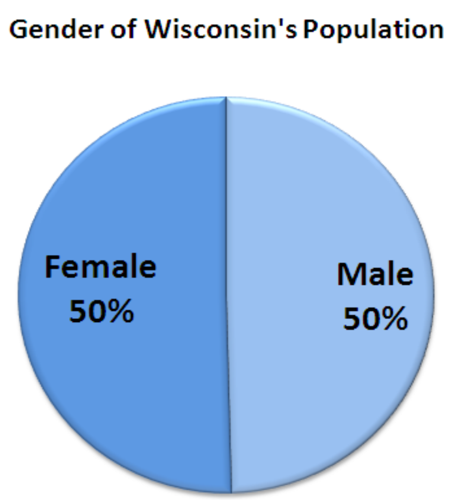
WATA
Wisconsin Agricultural Tourism Association Inc.

UW Extension
Cooperative Extension

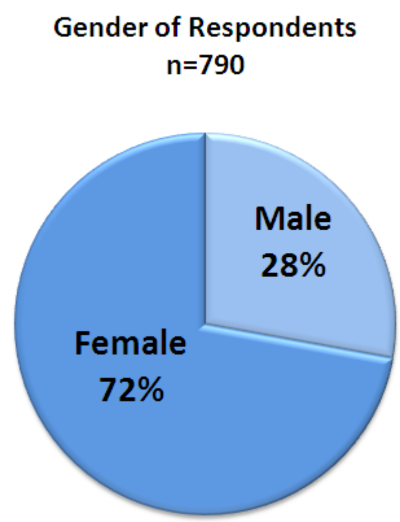
Results

The data received through this study was analyzed using descriptive statistics.   Additional statistical analysis will be conducted to explore ongoing research questions.

Demographics



* 2010 US Census http://2010.census.gov

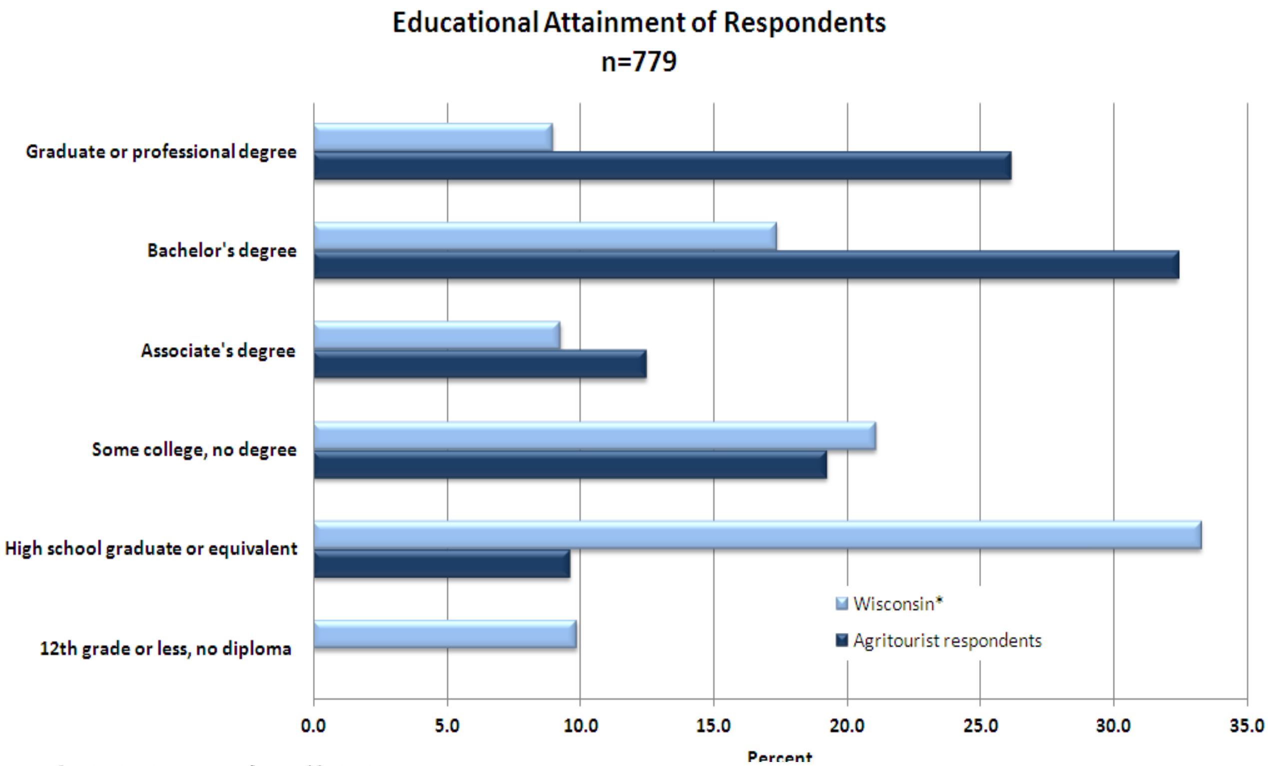


The demographic data collected from the survey was compared to the demographic data for the State of Wisconsin according to the US Census American Community Survey. The overwhelming majority of respondents, 72%, were female and 28% were male. The median age of sample was 52 years but males who responded tended to be older. The median age for female respondents was 50 years and the median age for male respondents was 57 years. **When compared to the US Census American Community Survey data for the state of Wisconsin, Wisconsin's agritourists with a median age of 52 years are older than the average Wisconsin resident whose median age is 38.5 years.**

Agritourists in Wisconsin have higher levels of educational attainment that the average Wisconsin resident. 58.6% of respondents reported having a bachelor's, graduate or professional degree while 26.3% of Wisconsin residents have a bachelor's degree or higher.

Agritourists also appear to have higher household incomes that the average Wisconsin resident. The majority, 72.2% of respondents reported incomes of $50,000 or greater while 49.1% of Wisconsin residents report household incomes of $50,000 or more. 25% of survey respondents had incomes of $100,000 or more compared to the Wisconsin average of 16% with incomes of $100,000 or more.

The survey also inquired about household composition. **The largest percentage of respondents were couples with children over eighteen years of age (36%)** Retired couples and singles with children under the age of six year of age comprised the smallest percentage of respondents in the sample.



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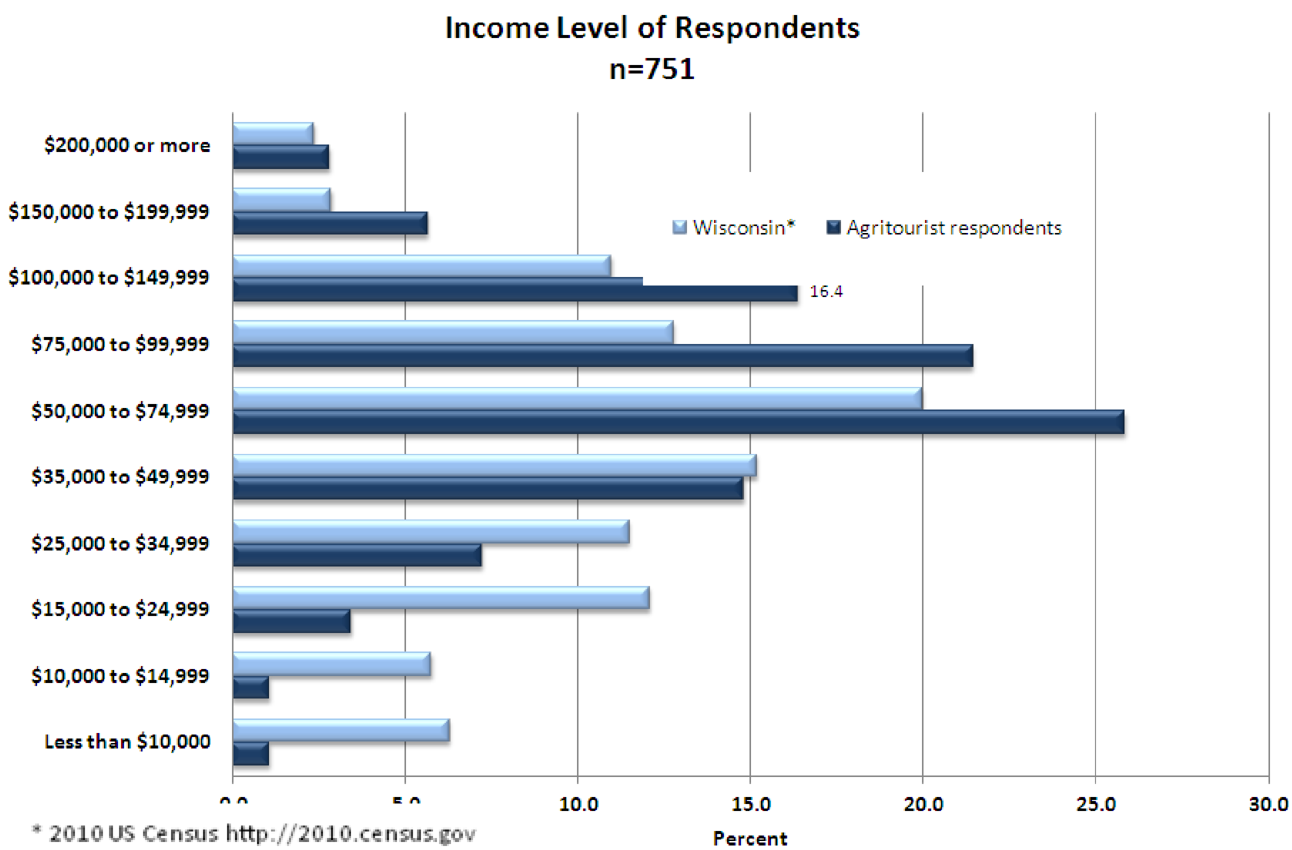

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Agritourist Characteristics, Motivations, and Preferences

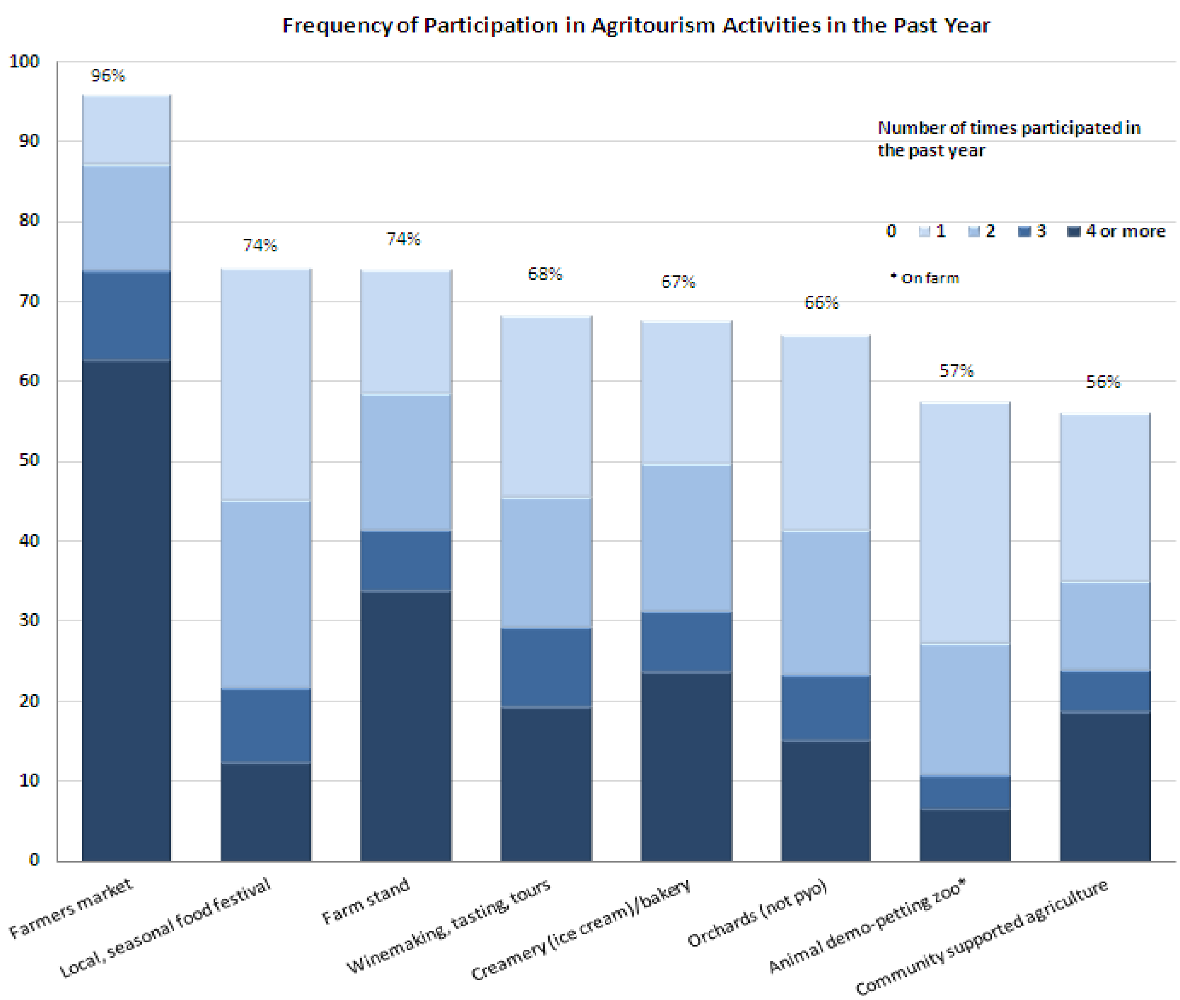
In order to better understand customer tastes and preferences the survey inquired about respondents' general understanding of agriculture as well as agritourism related activities they have participated in or plan to in the future. In planning for this survey businesses were particularly interested in using such information to explore cross marketing opportunities among customers of various enterprises within their business. The questions as presented in the survey are represented in Italics below.

Please select the statement which best represents your understanding of agriculture. (Please check one) n= 809

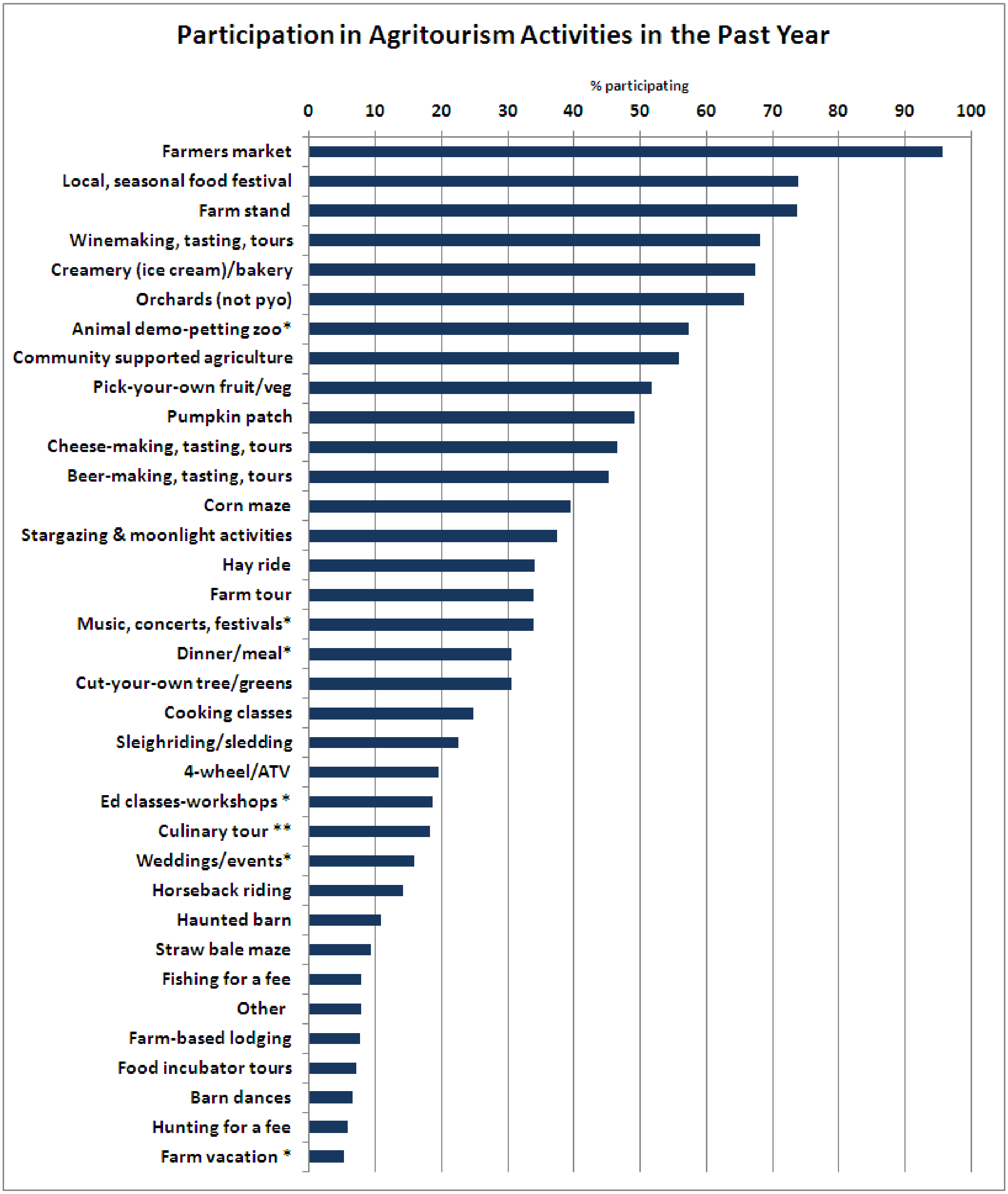
The overwhelming majority, 79.5% of Wisconsin's agritourists have some understanding of agriculture. 16.3% reported extensive understanding and only 4.2% reported no understanding of agriculture.

How many times did you participate in the following agritourism activities in the past year? (0,1,2,3, 4 or more).

The majority (over 50%) of Wisconsin's agritourists participated in the following activities at least once in the past year: visit to local or seasonal food festivals, farm stand, winemaking tasting or tours, visit to a creamery (for ice cream or bakery), visit to an orchard, visit to an animal demo or petting zoo, participation in community



supported agriculture, and pick-your-own fruits or vegetables. **The majority of respondents, 63%, participated in farmers markets four or more times in the past year.**



While the activities noted above were similar in the analysis of activities respondents participated in 2 or more times, the activities respondents participated in only *once* in the past year were somewhat different. These included visits to a pumpkin patch, corn maze, animal demonstrations or petting zoos, local, seasonal food festivals, cheese-making tasting or tours, cut-your-own tree/greens, and farm tours. This is logical given that some of these activities are very seasonal events (such as cutting a holiday tree or picking a pumpkin). This could also suggest potential to generate repeat visits for those activities that are right now, primarily one-time events.

Less than 10% of respondents reported having participated in straw bale mazes, fishing for a fee, farm-based lodging, food incubator tours, barn dances, hunting for a fee, farm vacations, and other activities (including bicycling, farm conferences, and cider tastings) at least once in the past year.

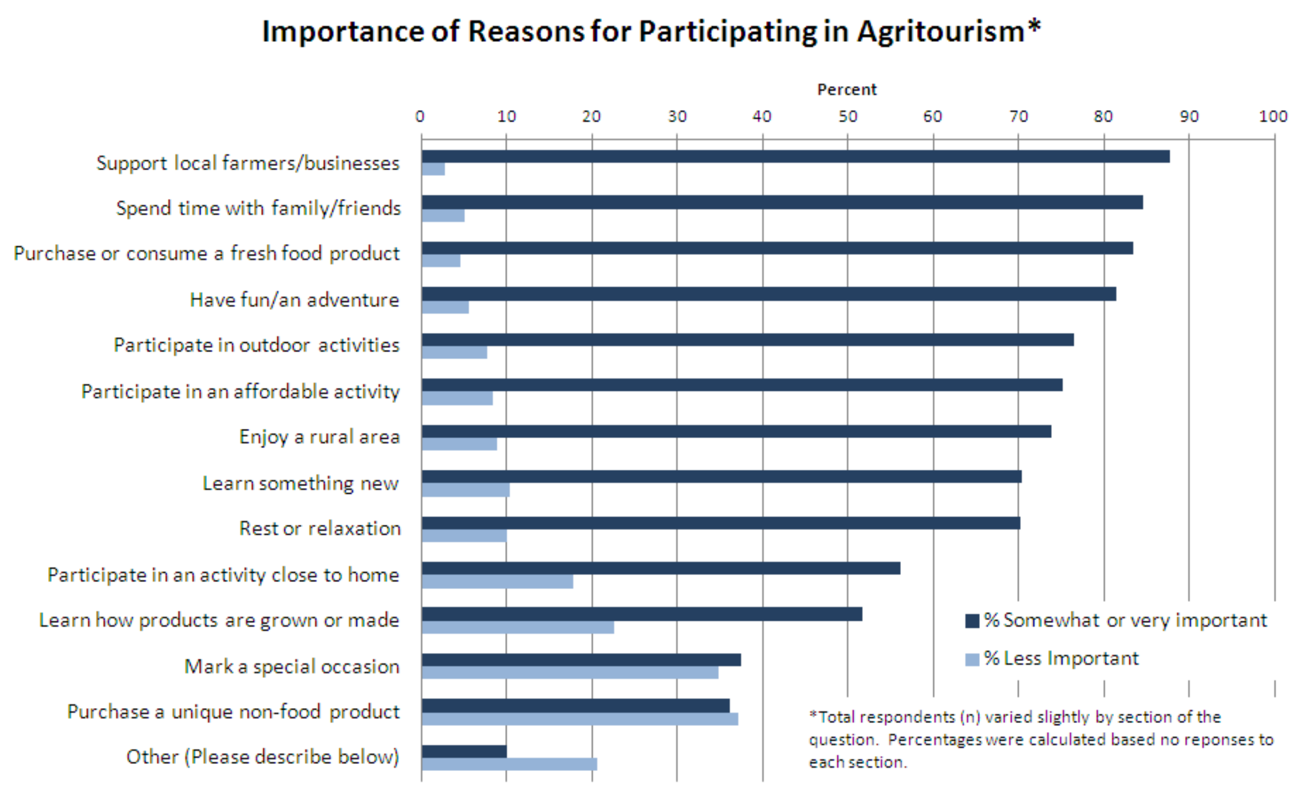
Other activities described in the comments section included farm based activities such as mushroom hunting, soils explorations, farmer gatherings, weddings, hay slides, and hunting for free. Many respondents also described experiences they have had on land or farms that they own.

Which agritourism activities do you plan to participate in the next year? (Mark all that apply)

The activities that respondents plan to participate in the coming year were very similar which were most frequented in the previous year. The majority of respondents plan to participate in farmers markets, local or seasonal food festivals, winemaking tasting or tours, farm stands, orchards (not pick your own) pick-your-own fruits or vegetables, and creamery (ice cream) or bakery visits.

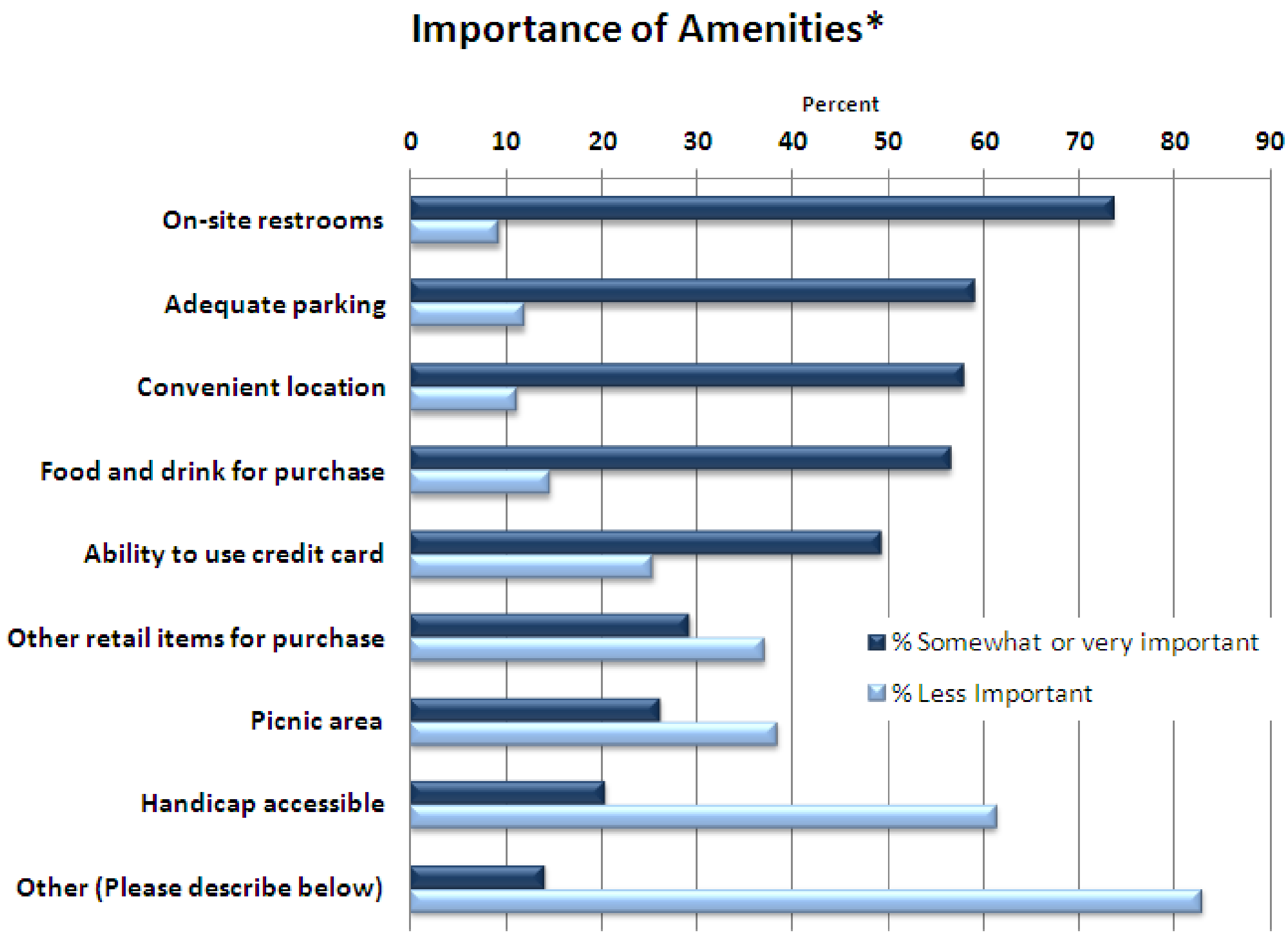
Another goal of the survey was to assess consumer motivation for participating in agritourism related activities. For the purpose of analysis, rankings of 4 or 5 were considered "Somewhat or very important." Rankings of 1 or 2 were considered "Less or not important."

Please rate the importance of each reason why you have participated or would participate in an agritourism activity. (1= Not Important to 5 = Very Important. "Other" please describe.



For the majority of Wisconsin's agritourists, (88%) supporting local farmers/businesses was a somewhat or very important reason for participating in an agritourism activity. Additional reasons include spending time with family and friends (85%), purchasing or consuming a fresh food product (83%), having a fun adventure (81%), participating in outdoor activities (76%), and participating in an affordable activity (75%). Least important reasons were "other" (10%, including learning new things, teaching children about new things and connecting with farming, purchasing a unique non-food product (36%), marking a special occasion (38%), and learning how products are grown or made (52%).

Please rate the importance of the availability of the following amenities when you participate in an agritourism activity. (1= Not Important to 5= Very Important)



The three most important amenities were on-site restrooms (74%), adequate parking (59%), and convenient location (58%). The least important amenities were picnic area (26%), handicapped accessibility (20%), and other (14%) which included farming conferences, cider tasting, and bicycling.

Additional responses to this question included providing learning or educational experiences, exposing children to new or educational experiences, and building connections with other people, farmers, or businesses.

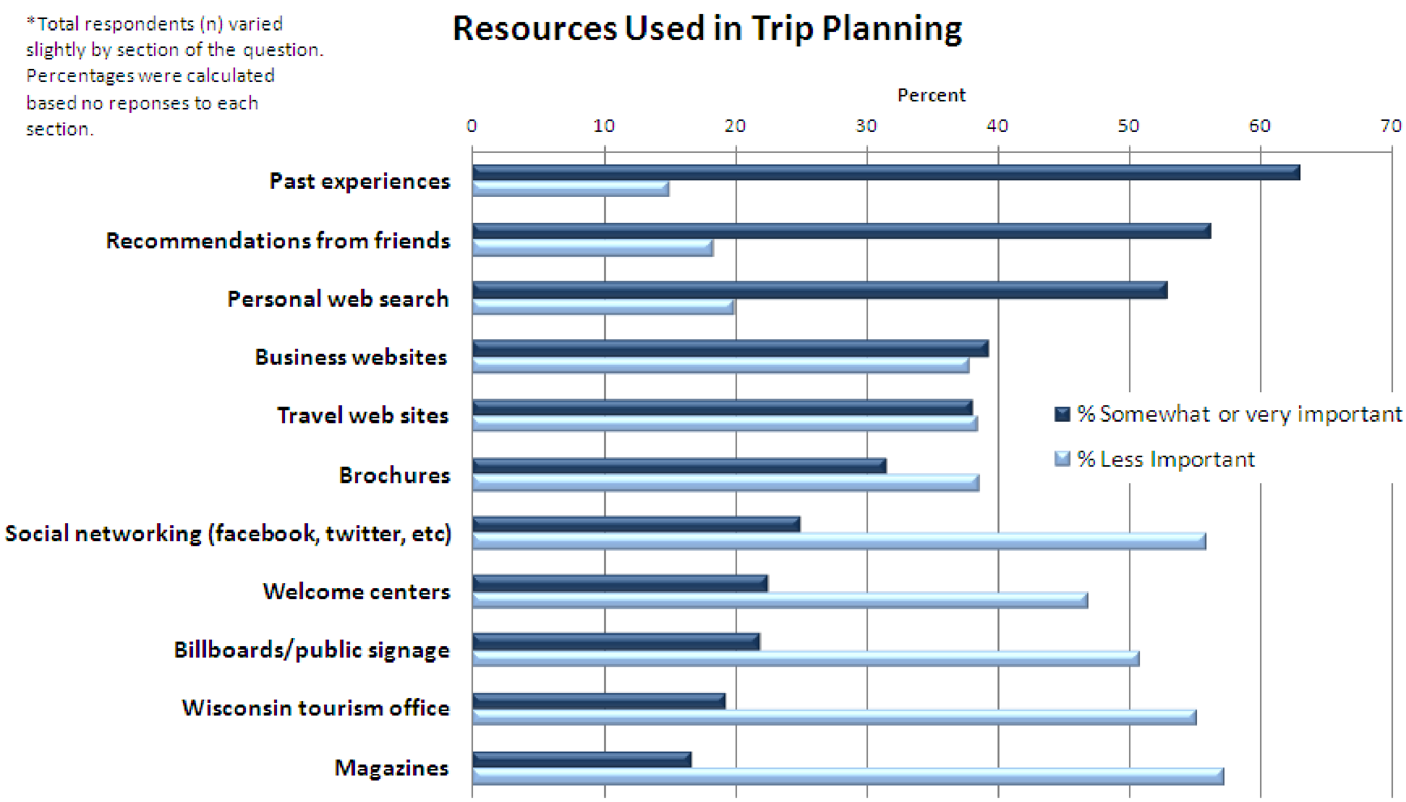
Agritourist Visits and Spending

Respondents were asked a number of questions regarding their last visit involving agritourism. These questions were intended to inform agritourism business planning.

Please consider your last visit that involved agritourism. How important were the following resources in planning your trip? (1= Not Important to 5=Very Important).

Rankings of 4 or 5 were considered “Somewhat or very important.” Rankings of 1 or 2 were considered “Less or not important.” **Respondents found past experiences (63%) recommendations from friends (56%), personal web searches (53%), and business websites (39%) to be the most important tools in planning their tourism visit.** The least important resources were billboards/public signage (22%), the Wisconsin tourism office (19%), and magazines (17%).

*Total respondents (n) varied slightly by section of the question. Percentages were calculated based no reponses to each section.



Please consider your last visit that involved agritourism. About how much did you spend in the following categories?

Median spending during respondents’ last trip involving agritourism was $137.50. The average spending in all categories was $443.50 but since there were some significant outliers the median is likely to better reflect the true average.

Of those respondents who reported spending any money during their last agritourism visit, 93.8% spent on food or drink items produced by an agritourism business, 64% spent on non food or drink items at an agritourism business, and 63.1% spent on food or drink items produced elsewhere. 33% of respondents spent money on lodging. The median spending in each category was lodging ($87), food and drink items produced by ah agritourism business ($105), non food items produced by an agritourism business ($96), entertainment ($21), and other ($2).

Please indicate the season you are most likely to visit a farm or participate in an agritourism activity. (Rank from 1= Most Likely to 4 = Least Likely) [1]

Respondents were most likely to participate in agritourism activities in the Fall (63%) or Summer (56%) and least likely to participate in Winter (8%).

Please indicate with whom you would be most likely to participate in an agritourism activity. (Rank from 1 = Most Likely to 4 = Least Likely) [1]

The greatest percentage of respondents participate in agritourism activities with their spouse or partner (74%), with family (70%) or friends (48%). Participants were least likely to visit with a school, church, or tour group.

Please consider your last visit that involved agritourism. What would have improved your agritourism experience?

This data was provided back to individual businesses for their own business planning. Overall, the respondents to this question seemed satisfied with their tourism experience. While additional coding and analysis is necessary to confirm themes in this data, the “wordle” below shows demonstrates the frequency of some of the words in the comments provided. Issues related to weather, signage, and information appeared frequently.