



**Tourism Development Council Meeting  
Board of County Commissioner's  
Joint Meeting  
Thursday  
March 7, 2023  
1:00 – 2:00 p.m.**

Development Services Building (DSB) RM 115  
Zoom: <https://clackamascounty.zoom.us/j/82625780049>

**12:15 p.m.** (or as people can get there) Lunch from Wayward Sandwiches

**1 p.m. Welcome & Introductions**

County Chair Tootie Smith & TDC Chair David Penilton

**1:10 p.m. Tourism Annual Report and Highlights**

Samara Phelps, Executive Director

**1:20 p.m. Updating Tourism's 5-year Strategic Priorities**

- Introduction – David Penilton, TDC Chair
- Proposed Priorities- Samara Phelps
- Discussion – TDC & BCC
  - What stands out in the priorities? What resonates with you?
  - What alignments do you see with County priorities/needs?
  - How might the TDC BCC collaborate in the coming years?

**1:35 p.m. Possible Legislation for Farms, Value Added Products & Tourism**

- Introduction – Chair Smith
- Discussion – TDC & BCC

**1:50 p.m. Upcoming opportunities**

David Penilton

**1:55 p.m. Adjourn**

# CLACKAMAS COUNTY TOURISM 5-Year Strategic Priorities



Build local tourism value through relevant tourism resources and awareness.

Enhance authentic experiences so businesses, communities and the economy thrive.

Encourage behaviors and practices that benefit the natural environment.

Improve the awareness and experience of Mt. Hood Territory as an inclusive and accessible destination.

Drive visitation that aligns with the specific needs of a place including regional and seasonal needs.

Clackamas County Tourism, branded as Oregon's Mt. Hood Territory, is the destination organization for the county. Overseen by the Tourism Development Council, Tourism's mission is to enhance the quality of life for residents by optimizing the economic impacts of the tourism industry derived from the County's Transient Room Tax. The [Tourism Master Plan](#) guides Tourism's work. Five-year strategic priorities support the implementation of the Tourism Master Plan.

The Tourism Development Council is updating the strategic priorities. Five primary objectives emerged after evaluating the destination from the visitor, resident, partner perspective and considering the impacts on place. This process included gathering input and recommendations through:

Resident survey of more than 1,800 current residents

Tourism industry partner survey

Discussions with community tourism leads

Oregon's 2023 visitor profile

Industry best practices

Global Sustainable Tourism Council (GSTC) sustainable destination assessment

County-specific visitor trends and forecasts for the sector

Achieving these objectives requires building on the strengths of the destination and organization. The tourism pillars for the destination remain outdoor recreation, agritourism and cultural/heritage tourism. A vibrant destination and thriving communities require effective marketing and development grounded in sustainable tourism best practices. Success continues to depend on strong partnerships.

# CLACKAMAS COUNTY TOURISM

## 5-Year Strategic Priorities

### Objectives with Supporting Strategies



#### BUILDING VALUE

Build local tourism value through relevant tourism resources and awareness.

Provide programs focused on partners' needs to meet future demands by building relationships with businesses, community partners and industry leaders.

Leverage larger efforts to benefit the destination by fostering partnerships locally and regionally.

Align visitor demand with community needs by providing and utilizing meaningful data and industry best practices.

Increase engagement with tourism by proactively communicating tourism benefits and opportunities with community leaders and residents.



#### THRIVING ECONOMY

Enhance authentic experiences so businesses, communities and the economy thrive.

Distinguish the destination by highlighting authentic and local experiences reflective of the area.

Foster a resilient destination by preparing for change and crisis, supporting resilient infrastructure, prioritizing recovery and adapting programs as needed.

Support local visitor facing businesses and sites through opportunities specific to the site and collaborations.



#### ENVIRONMENT

Encourage behaviors and practices that benefit the natural environment.

Educate visitors, residents and partners in behaviors that positively impact the environment.

Support systems that make having a positive impact easier than activities with a negative impact.

Engage in collaborations that support quality outdoor experiences and the integrity of the natural environment.

Implement strategies informed by the changing climate.



#### ACCESSIBLE & INCLUSIVE

Improve the awareness and experience of Mt. Hood Territory as an inclusive and accessible destination.

Build interest and confidence in visiting by representing the destination accurately to inspire and inform both trip planning and while in destination.

Broaden the benefits of tourism by working with communities defined by more than geography.

Expand opportunities to experience diverse heritage and culture by elevating underrepresented voices, businesses and cultural opportunities.

Reduce barriers to travel by collaborating with diverse communities to address the wide range of traveler needs and improve access to destination assets.



#### FLOW

Drive visitation that aligns with the specific needs of a place including regional and seasonal needs.

Identify opportunities by participating in community efforts and understanding resident, partner, community and visitor needs.

Expand the benefits of tourism to underutilized assets by supporting projects that drive visitation and promoting to audiences that strongly align with the product.

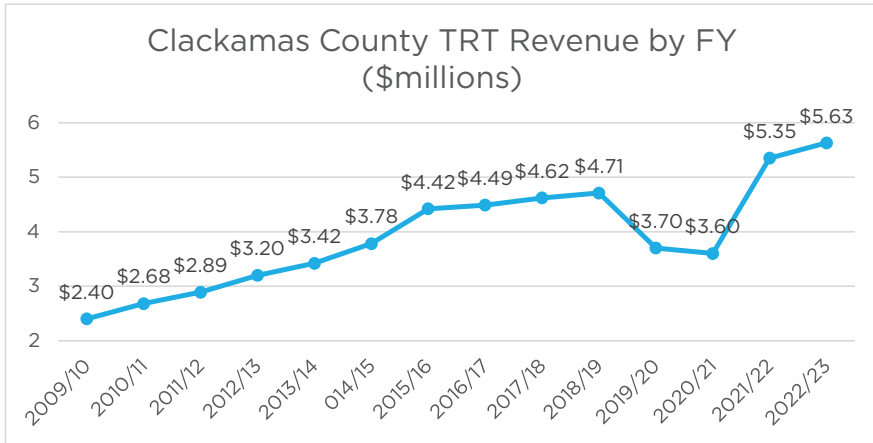
Support the needs of high use sites through messaging and experience improvements.

Encourage visitors at popular sites to frequent local businesses in nearby communities.

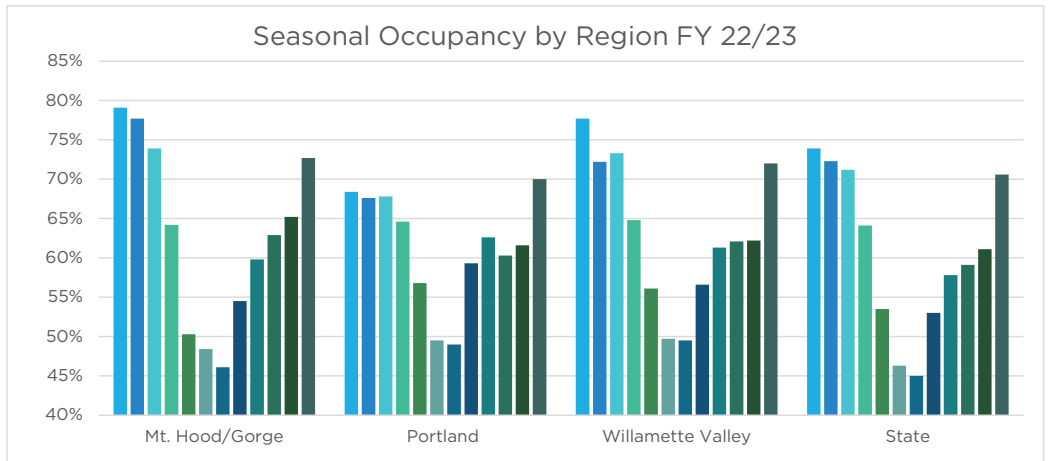
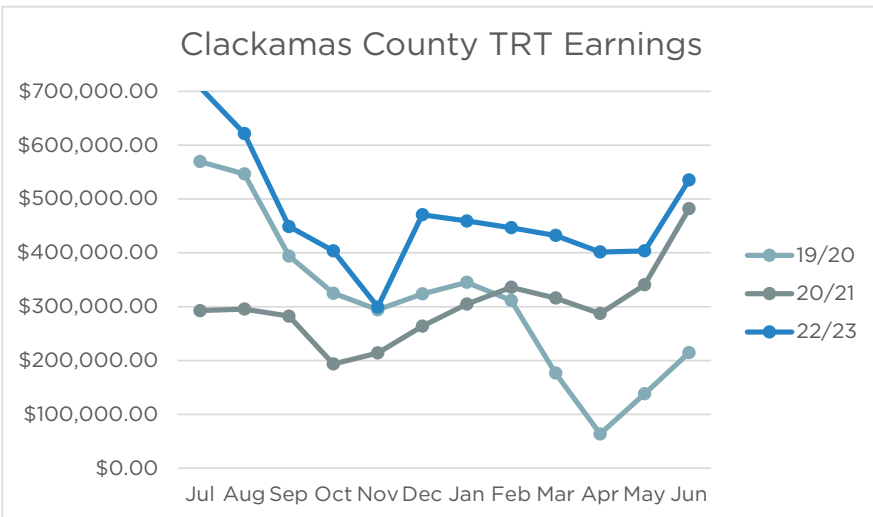
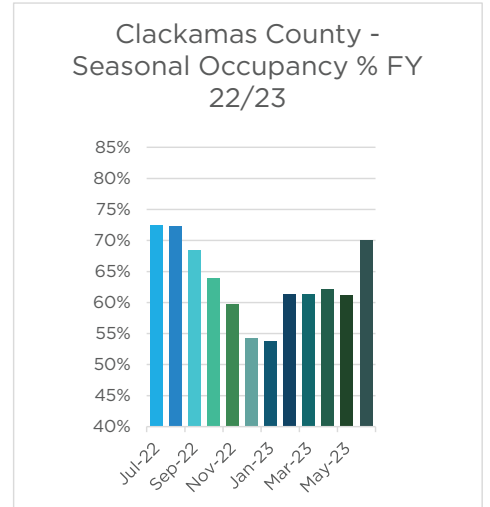


# FY 22/23 Annual Report

Clackamas County Tourism’s mission is to improve the quality of life for residents by optimizing the economic impacts of the tourism industry. The statistics shared here are indicators of the industry’s benefits as an economic driver.



TRT earnings (left) show strong recovery, with FY 22/23 performing above prepandemic levels (first part of FY 19/20). FY 22/23 seasonal occupancy (right) shows lower occupancy rates during the winter months. When compared to regional and state trends for the same time period (below) Clackams County’s winter occupancy remains stronger with less marked seasonal change during FY 22/23.



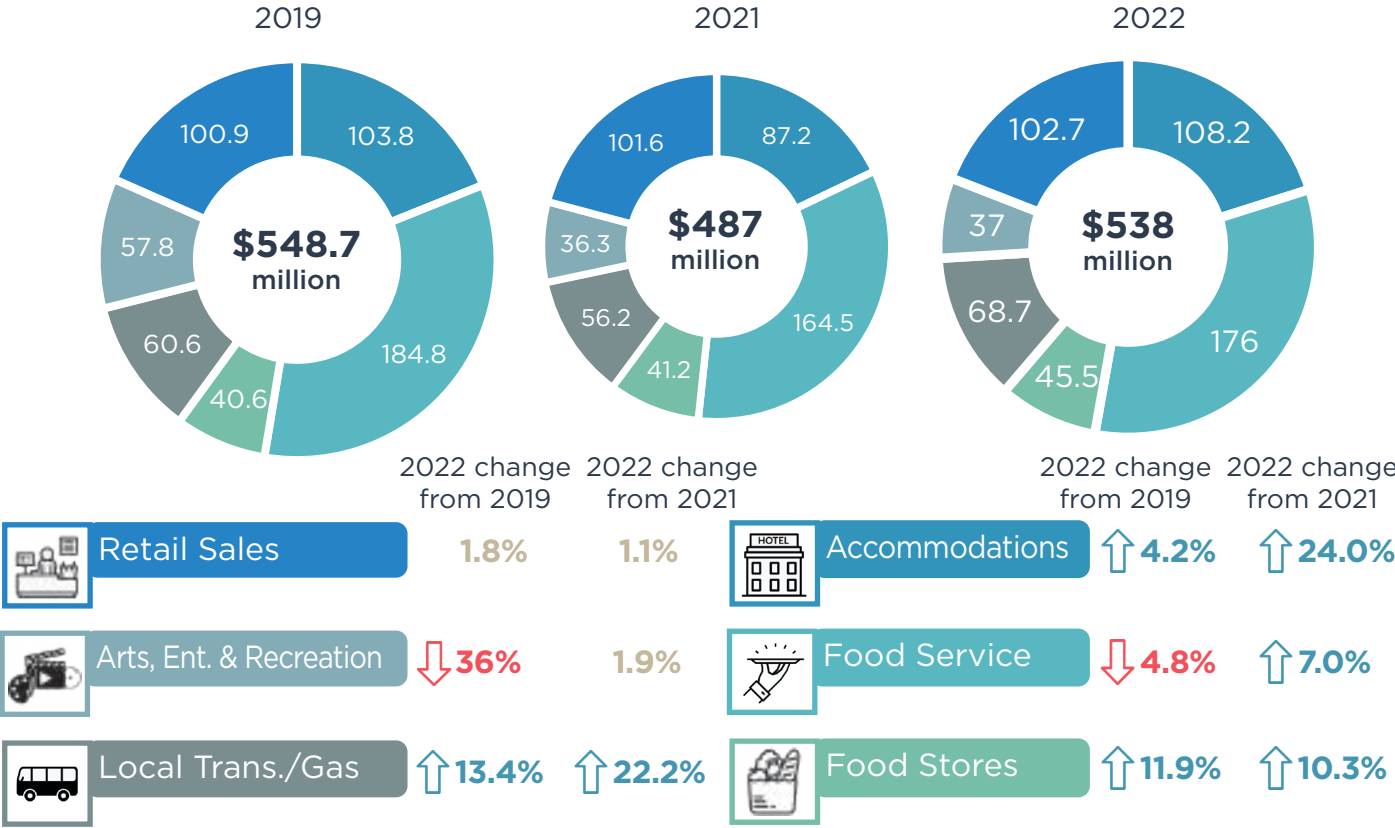
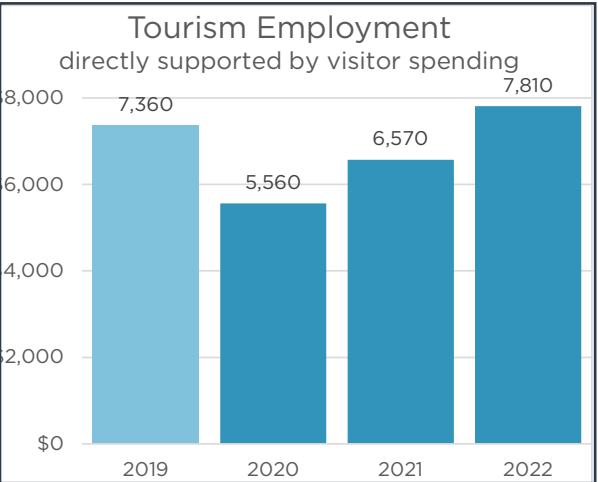
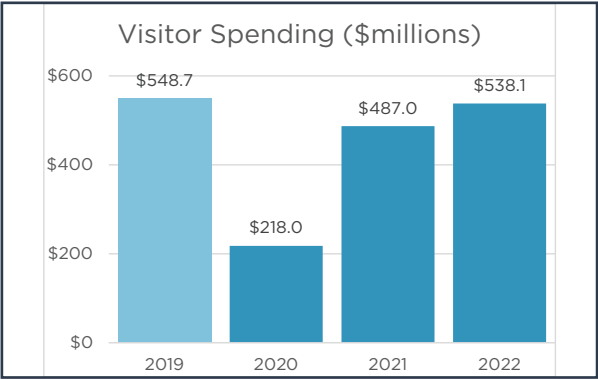
Clackamas County TRT Collections

Smith Travel Research (STR)

# 2022 Economic Impact Measurements

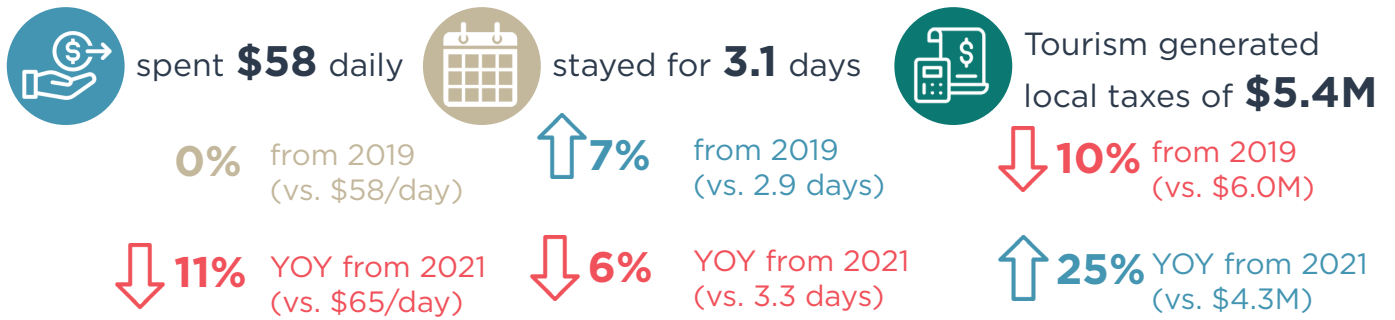
## VISITOR SPENDING BY SECTOR

Overall, 2022 visitor spending in Clackamas County reached **98%** of 2019 (prepandemic) levels. Below is a breakdown of total visitor spend by commodity purchased in (\$millions). *Details may not add to totals due to rounding. - Dean Runyan & Associates*



## LOCAL IMPACT

In 2022 the average visitor...



Dean Runyan & Associates  
Earnings and Employment include CARES Act support for 2020

Dean Runyan & Associates  
[industry.traveloregon.com/resources/research](http://industry.traveloregon.com/resources/research)

# FY 22-23 Datafy Visitor Trends

Datafy leverages data sources like geolocation, spending, demographics, transportation and more to turn “big data” into reportable and actionable insights. These insights help destination managers with decision making. Datafy represents trends of data rather than precise number counts in a destination because of the variables in how the data is collected. On the next few pages, the data is set to represent all visitors from FY22/23 whose main residence is from 50+ miles away from Clackamas County.

## All of Clackamas County

Overview : 7/1/22 - 6/30/23



## Mountain

Overview : 7/1/22 - 6/30/23



## Urban

Overview : 7/1/22 - 6/30/23



## Valley

Overview : 7/1/22 - 6/30/23



The above shows a significant increase in unique visitors in FY 22/23 over FY 21/22 with a relatively stable number of total visitor trips. This is likely due to the fact that FY 21/22 was still relatively impacted by COVID with a significant number of in-state repeat visitors. In FY 22/23 we saw an increase in fly and drive markets from others states, so while there are a larger number of unique visitors than the previous year, we see little change in total trips because there were fewer repeats within the year from those visitors.

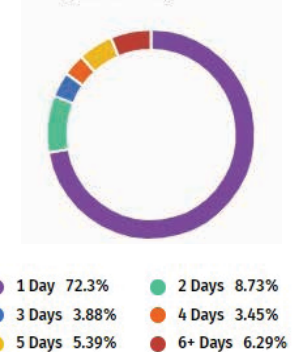
Comparison of Trips



Trips by distance from destination

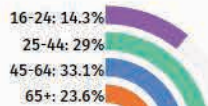


Length of Stay

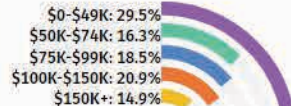


## Visitor Demographics

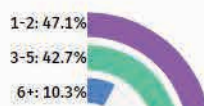
Age



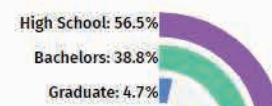
Income



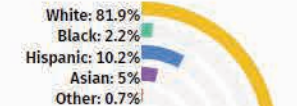
Household



Education Level



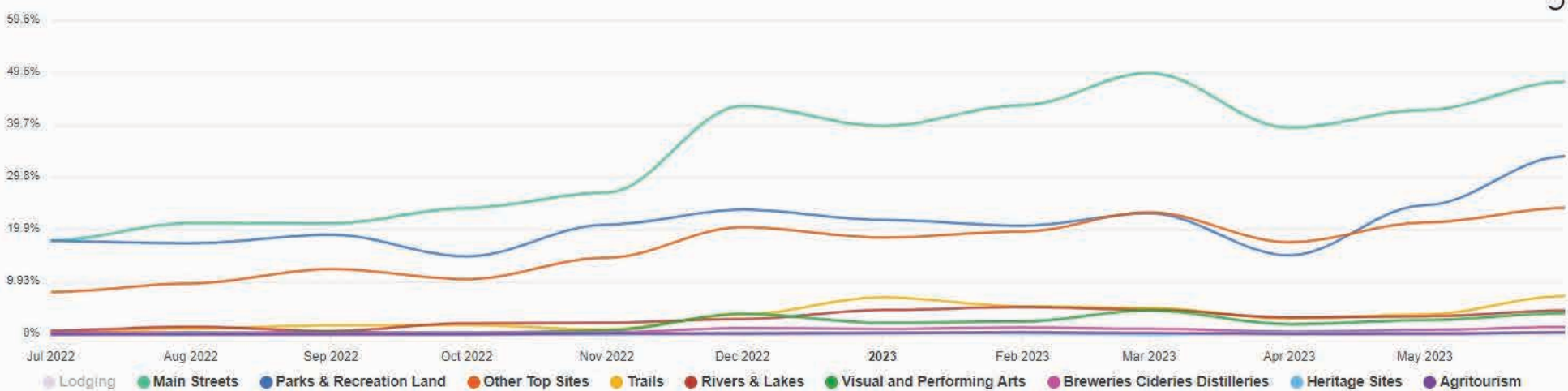
Ethnicity



# FY 22-23 Datafy Visitor Trends

The below data shows the correlation of all visitors (50+ miles away) who stayed in lodging and what type of activity areas they visited over the course of their trip(s) during FY 22/23. Visitation to main streets increased starting November 2022 and continued to see increases over the holidays as well as spring break 2023.

Correlation Over Time

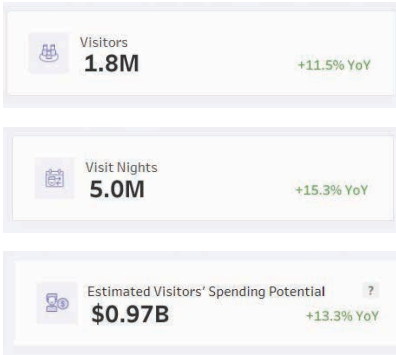


To the right are top visited “sites” in Clackamas County in FY 22/23. Though Datafy is not able to capture a true visitor count, this data is incredibly valuable in identifying trends. Here, you will notice our highest visited tourist attraction areas are those mostly based on Mt. Hood. This aligns with our understanding of top tourism sites in the region. However, when looking at the overall trip visitation in the previous Datafy page, the urban (Portland) region still receives the highest number of overall visitor trips in the county by more than double as compared to the Mt. Hood region. This could be due to the proximity to Portland city attractions, Clackamas County’s urban lodging options for Portland and/or a close place to visit friends and family or one of our main streets.

Location	Trips
Hood National Forest Zigzag Distric...	1,470,026
Clackamas Town Center PR	582,234
Wilsonville Main Street	527,304
Government Camp Main Street	205,147
Summit parking lot MHG	191,055
Timberline Summit Ski Area MHG	189,904
Sandy Main Street	174,836
Villages of Mt. Hood Main Street	150,302
Oregon City Main Street	136,171
Timberline Lodge & Ski Area	83,814
Lake Oswego Main Street	81,705
Willamette River - lower PR	80,178
Mt Hood Skibowl MHG	67,257
Happy Valley Main Street	65,814
Mt. Hood National Forest Clackamas D...	53,251
West Linn Main Street	47,774
Cascadia Center for Arts & Crafts	43,849
Wooden Shoe Tulip Farm WV	42,844
Monarch Hotel & Conference Center	42,511
Molalla Main Street	38,526
Canby Main Street	37,099
Clackamas River - lower PR	36,229

## FY 22-23 Placer.ai Visitor Trends

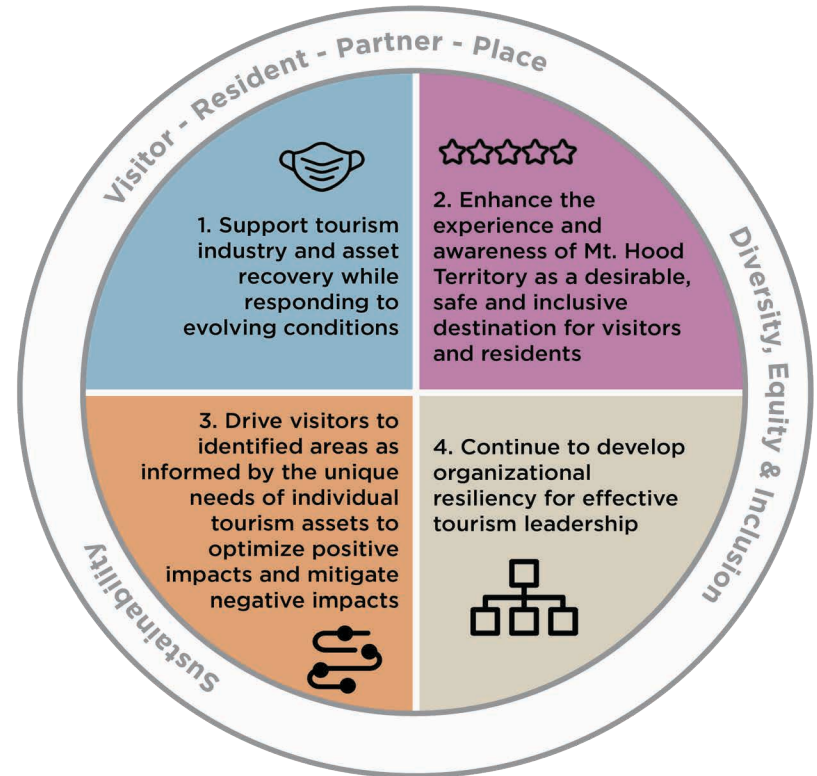
With the Mt. Hood/Gorge Region's access to data platform Placer.ai, we were able to pull a FY 22/23 tourism report for Clackamas County top visitor markets including daily disposable income. This data represents visitors from the US that spent the night in the county and stayed no more than 31 days.



CBSA	Visitors				Visit Nights				Median Daily Disposable Income			
	0K	200K	400K	600K	800K	0K	500K	1000K	1500K	2000K	\$0	\$200
Portland-Vancouver-Hillsboro...	0.57M				1.5M				\$199.6			
Seattle-Tacoma-Bellevue, WA	0.15M				0.31M				\$256.1			
Corvallis, OR	73.7K				0.31M				\$162.4			
Salem, OR	98.6K				0.28M				\$163.0			
Eugene-Springfield, OR	85.2K				0.26M				\$146.9			
Bend, OR	64.5K				0.14M				\$179.9			
Los Angeles-Long Beach-Anah...	42.8K				0.14M				\$240.9			
Phoenix-Mesa-Chandler, AZ	29.6K				0.10M				\$207.8			
San Francisco-Oakland-Berke...	30.1K				86.1K				\$313.8			
Boise City, ID	24.6K				69.4K				\$179.3			
Medford, OR	25.3K				61.7K				\$152.8			
San Diego-Chula Vista-Carlsba...	14.8K				53.5K				\$233.4			
Sacramento-Roseville-Folsom...	19.9K				50.2K				\$222.6			
Spokane-Spokane Valley, WA	17.8K				48.8K				\$174.8			
Riverside-San Bernardino-Ont...	12.6K				45.7K				\$200.0			
Albany-Lebanon, OR	17.2K				37.4K				\$154.4			
San Jose-Sunnyvale-Santa Cla...	12.4K				36.7K				\$325.8			
Kennewick-Richland, WA	16.7K				35.5K				\$198.0			

## FY 22/23 Strategic Outcomes

Clackamas County Tourism set four key strategic outcomes for FY 22/23. These outcomes came out of a planning process involving stakeholder feedback, the Tourism Development Council and staff. The Strategic Outcomes respond to the current state of the tourism industry with the goals of recovery as well as optimizing tourism's impact across the communities of Clackamas County. In addition to the four Strategic Outcomes, Clackamas County applies three key lenses to all of our work: sustainability; Diversity, Equity and Inclusion; and the key stakeholders of Visitor, Resident, Partner and Place (VRPP). The following pages recap the intent of each Strategic Outcome and give examples of how Tourism's work during FY 22/23 supported the outcomes.





## Outcome 1: Tourism Recovery

“Support tourism industry and asset recovery while responding to evolving conditions”

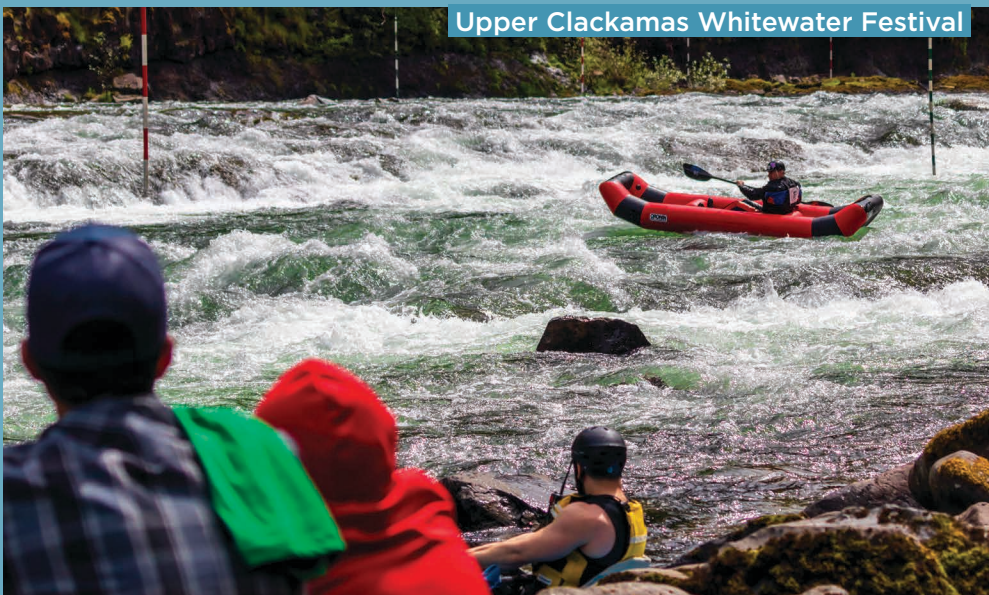
A survey of tourism partner businesses ranked impacts of COVID-19 and the 2020 Riverside Fire as barriers to their success and identified lasting effects to the visitor experience. This outcome is focused on those specific needs and acknowledges the possibility of ongoing impacts and future disruptive events.

To support tourism industry recovery following COVID, Clackamas County Tourism leaned in to providing direct support to businesses. Marketing support came in the form of **specially tailored collaborations**, as well as an **expanded Marketing Support Co-Op Program**. Co-Op offerings included print and digital marketing with local and global ad outlets. Price to participate ranged from \$50 - \$750 to meet the needs of diverse partner businesses. A total of 45 businesses participated in the FY 22/23 Co-Op program, many using multiple offerings.



Not all sectors within the tourism industry were impacted equally by COVID. Among the hardest hit were food and beverage as well as heritage assets. In January 2023, Clackamas County Tourism **refreshed and rebranded our Tap Trail, Wine Trail and Heritage Trail**. The new look and feel of the trails paired with improved functionality. We supported the relaunch of the passes with tailored paid advertising campaigns. The program refresh resulted in 12k views of the Heritage Trail content, 477 Tap Trail sign ups and 418 Wine Trail sign ups. The Tap Trail and Wine Trail together drove 237 visits to business via gamified passport check-ins and redemptions.

Upper Clackamas Whitewater Festival



In FY 22/23 impacts of the 2020 Riverside Wildfire were still effecting the Upper Clackamas River recreation assets and the nearby community of Estacada. Clackamas County Tourism funded a request from the National Forest Foundation leveraging federal funding to **restore the Rainbow Campground and Riverside Trail**, year-round recreation assets. Additionally, Mt. Hood Territory provide an **event sponsorship for the 2023 Upper Clackamas Whitewater Festival** to assist the event's recovery momentum after a 3-year hiatus due to COVID and the wildfire. These investments support immediate community needs as well as develop long-term destination assets.

## Outcome 2: Safe and Inclusive

“Enhance the experience and awareness of Mt. Hood Territory as a desirable, safe and inclusive destination for visitors and residents”

This outcome considers both perceptions of Mt. Hood Territory as a destination, as well as elements of safety in the on-the-ground experience. It encompasses DEI values and travel for all. It also considers safety for visitors and residents in the face of natural disasters.



We launched our **“Otter Do” campaign** featuring an animated river otter offering a friendly invitation for visitors to travel responsibly in Mt. Hood Territory. The campaign addresses visitor safety as well as destination health and its effect on residents. “Otter Do” messaging was supported with paid advertising, resulting in 13k page views and over 3,300 conversions. YouTube video content received nearly 30,000 views across 6 videos. The “Otter Do” page was one of our top 10 most visited pages for FY 22/23, and contributed to **safe behaviors and perceptions of responsible tourism.**

The **Sandy Actors Theatre** received a **Strategic Investment Program grant** from Mt. Hood Territory in the amount of \$20,000 to replace stadium style seating with **ADA-friendly and flexible seating options that will enable all guests to attend and better enjoy performances** regardless of physical or mobility challenges. The improvements will work to expand visitation to new and diverse audiences.

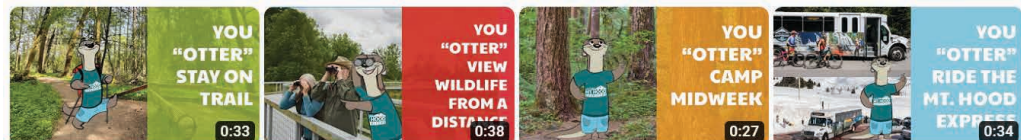


From recent wildfire experience, we knew that visitors staying in vacation rental properties were the most difficult to support during disasters. To address this need, we provided 72-hour **emergency kits with customized Clackamas County emergency information** to vacation rental properties registered with Clackamas County TRT. The project delivered supplies for 1,136 people to 151 properties, most in rural Clackamas County. This project benefitted both visitors and residents’ safety in the destination by easing strain on first responders.

**Otter Dos** ▶ Play all

### Otter Do Responsible Travel Videos

No matter when you visit Mt. Hood Territory, you’re set to have a great time. Each season presents its own list of things you should know to ensure your trip is as good as possible. The Mt. Hood...



**Why Should You Stay On Trail And Practice Leave No...**

Oregon's Mt. Hood Territory  
29K views • 9 months ago

**Be Safe And View Wildlife From A Distance**

Oregon's Mt. Hood Territory  
122 views • 7 months ago

**Top Reasons To Camp Midweek**

Oregon's Mt. Hood Territory  
17 views • 8 months ago

**Best Way To Travel Up Mt. Hood - Ride The Mt. Hood...**

Oregon's Mt. Hood Territory  
100 views • 10 months ago



**Emergency Kits for Vacation Rentals**

## Outcome 3: Visitor Flow

“Drive visitors to identified areas as informed by the unique needs of individual tourism assets to optimize positive impacts and minimize negative impacts”

Clackamas County is a large destination, with varied needs across geographic and industry sector areas. This outcome focuses on supporting areas that are at capacity and driving visitors to underutilized assets.

Knowing that there is a demand for outdoor recreation in our destination and that many areas especially on Mt. Hood experience negative impacts from overuse, Mt. Hood Territory created an **outdoor recreation map for the Molalla River Recreation Corridor**. Mt. Hood Territory convened Molalla tourism leaders and worked with Travel Oregon to complete and distribute the brochure map, which included recreation assets as well as agritourism experiences, dining and shopping around Molalla. This project takes an identified interest area - outdoor recreation - and provides an alternative experience in an area with capacity.

### Molalla River Corridor Recreation Map CITY OF MOLALLA



You'll find all kinds of adventure in the forests and farms across the Wild & Scenic Molalla Corridor—and will cover those soon enough—but the city of Molalla itself rewards visitors who take time to stroll the cozy downtown core, dive into its historic charms, and embrace a wide range of fun attractions.

Want to ride a miniature train, dive into regional history, or actually skydive from more than three miles up? You can do it all (and then some) in Molalla. Here's a sampling of ideas and attractions to help you plan a memorable trip to the friendly community.

- **Molalla Train Park:** Since 1954, Molalla Train Park has offered joyous rides on miniature trains to kids of all ages. Today, the four-acre park features a 2,000-foot-of-track—all of which can be explored with rides that showcase ponds, shrubs, bridges, and impressive forested scenery. Rides typically last 7-10 minutes and are offered May-October.

- **Escape Molalla:** Do you think you and your friends or family can solve all the puzzles and make it out in time? Find out at Escape Molalla, the city's beloved escape room. There you'll be locked in

forests, and the Molalla River winding through it all.

- **Molalla Museum Complex:** Since time immemorial, the Molalla people have hunted, fished, knaged, and lived in and around present-day Molalla. More recently, European-American settlers and farmers moved to the forested foothills of Mount Hood in the mid-1800s, transforming the region forever. Get a feel for that history at the Molalla Museum Complex, which includes several structures, displays, exhibits, and artifacts that cover the area's Native American populations, European settlement, the rise and fall of the local timber industry, and other fascinating topics.

- **Molalla Buckeroo:** The famous Molalla Buckeroo has been showcasing some of the country's best cowboys and cowgirls for more than a century and remains a regional icon today. Enjoy a dose of small-town charm over Independence Day weekend with an on-site carnival, Molalla's Rodeo Walk of Fame, five days of rockin' rodeo events, and a nightly fireworks display.

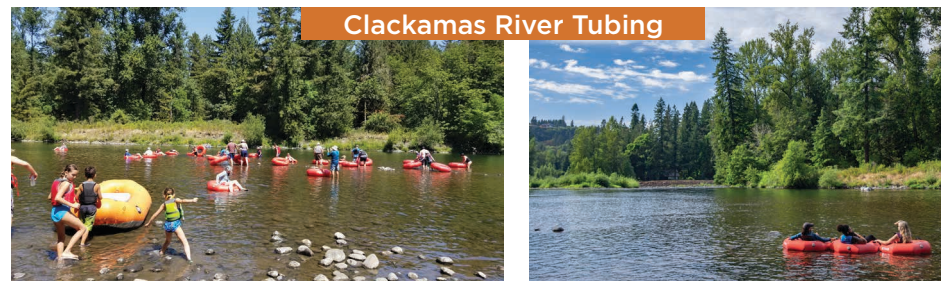
- **Enjoy a filling meal:** Chefs all over Molalla source their ingredients from local ranchers and farmers to craft fresh, filling, and flavorful dishes. Enjoy a variety of burgers, sandwiches, and barbecue-influenced dishes at The Humble Pig Cafe, Mexican fare from the Taqueria La Sileta food truck, or pies and wings from Bear Creek Pizza and Pub.

- **Splat Action Paintball Park:** As one of the oldest paintball parks in the Pacific Northwest, Splat Action is a community institution that offers 12 wooded acres teeming with bunkers, buildings, treeshouses, and other exciting obstacles.

- **Skydive Oregon:** Enjoy views of Mount Hood from above Oregon's tallest peak with an adrenaline-pumping jump through Skydive Oregon. First-timers can try tandem jumps with an experienced skydiver—and start their thrilling descents from as high as 18,000 feet. On your way down, epic views include Willamette Valley farmland, thick



To address summer congestion along the popular stretch of the Clackamas River, Mt. Hood Territory **convened a group of land managers and partners to put together an informational campaign promoting alternative float options**. Working with State and County Parks and nonprofit groups like We Love Clean Rivers, we worked to mitigate the negative impacts through visitor dispersal. Learnings from the 2022 season went on to improve the following year of the initiative.



Clackamas River Tubing

Lodging tax collections showed that Clackamas County's urban Portland region hotels were continuing to recover more slowly than other regions of Clackamas County, so we ran a **spring lodging campaign through Expedia featuring our Portland Region properties**. The campaign had nearly 17M impressions with 6,475 clicks to a custom landing page within the Expedia platform. This campaign resulted in the booking of 2,481 room nights with an estimated \$392,000 in gross bookings for our target properties.

### Urban (Portland Region) Expedia Campaign

expedia group  
media solutions

### Search Oregon's Mt. Hood Territory

Going to Lake Oswego Room, 2 travelers

Check-in Feb 4 Check-out Feb 5

Add a flight  Add a car

I need multiple places to stay

Search

Sponsored content by Mt. Hood Territory



### Best Oregon spring activities

Spring is a time of rebirth. If you're like us, your wanderlust also grows by the second. It's been a rough few years, and you deserve a vacation to make new memories with family and friends. We know these times might feel financially uncertain. If you're watching your spending, you've come to a great place to scout hotel savings, so you don't have to sacrifice one of a kind experiences, farm-fresh favors and handcrafted goods. Do more with less!



## Outcome 4: Organizational Resiliency

“Continue to develop organizational resiliency for effective tourism leadership”

Informed by COVID’s impact on Transient Room Tax revenue, this outcome focuses on organizational capacity to provide needed tourism programs and leadership responsive to the dynamic needs of the destination. Resiliency includes financial reserves to provide consistent tourism functions.

In FY22/23 we reached our goal for contingency reserve, **establishing a reserve that supports confident programming** and provides some stability from the short-term impacts of fluctuations in Transient Room Tax collection. The team also **added capacity and expertise** in communications, public relations, digital advertising and database management through industry leading contractors and passionate staff. Reaching this level of organizational stability and capacity expands the tourism resources available to partners and communities throughout Clackamas County and improves efficiencies.

Mt. Hood Territory Staff Team



Clackamas County Tourism brought back many of our **partner trainings and conference sponsorships** in FY 22/23, supporting our outcome of effective leadership of Clackamas County’s tourism industry. We brought back favorite in-person programs including the Annual Agritourism Summit and Frontline FAM Tours. We added new programs like Google Ad training to meet current partner needs. We had 104 partners attend our hosted trainings, and also provided sponsorships to allow 18 partners to attend specialized trainings and conferences beyond Mt. Hood Territory’s offerings.



In FY 22/23 we were able to **invest in data tools** to ensure strategic tourism development. Contracting with Datafy shows us visitor trends across industry sectors and geography of our region. We are already seeing the benefits of this investment, incorporating first-party data into audience targeting to **optimize our marketing**. Through the Mt. Hood Gorge Region we’ve also invested in Placer.ai visitor data. We are excited to **serve as a resource for local and community partners to get specialized data** to enhance their understanding of their own visitor trends.

# Oregon's Mt. Hood Territory Clackamas County Tourism



## TOURISM DEVELOPMENT COUNCIL

**David Penilton - Chair**  
America's Hub World Tours  
Oregon City

**Luke Spencer - Vice Chair**  
Clackamas River Outfitters  
Estacada

**Caterine Connall Nyland**  
Best Western Agate Beach (remote)  
Sandy

**Tessa Koch**  
TMK Creamery & Distillery  
Canby

**Gail Yazzolino**  
End of the Oregon Trail Interpretive & Visitor Information Center  
Oregon City

**Holly Pfortmiller**  
Best Western Plus Rivershore  
Oregon City

**Katen Patel**  
K10 Hotels, Milwaukie Inn  
Milwaukie

**Samara Phelps - Executive Director**  
Clackamas County Tourism

## MISSION

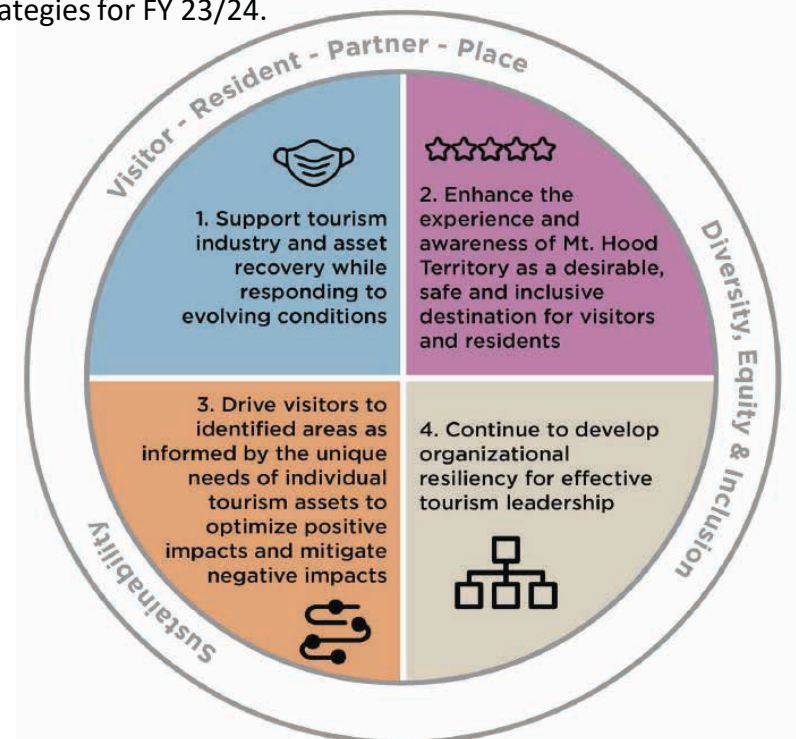
Enhance the quality of life for residents by optimizing the economic impacts of the tourism industry derived from the County's Transient Room Tax.

## VISION

Serve as the leading force to grow and sustain tourism in Clackamas County through effective and efficient marketing and asset development strategies, and by building strong partnerships with businesses, organizations, other governmental entities and citizens.

## FY 23/24 STRATEGIC OUTCOMES

Strategic outcomes from FY 22/23 were carried over to guide strategies for FY 23/24.

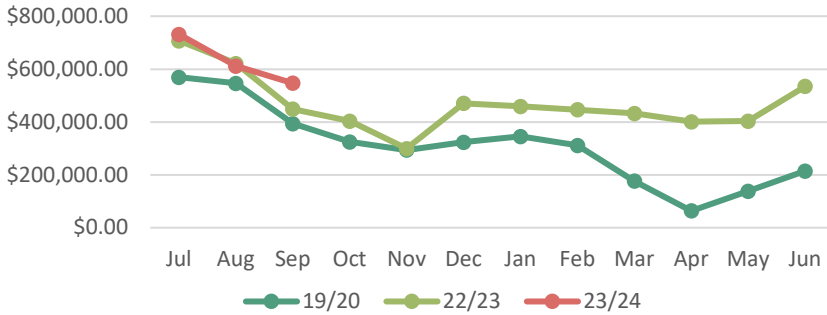


# Q1 FY 23/24 QUARTERLY REPORT

This quarterly report presents industry trends and highlights some of Mt. Hood Territory's key projects. Q1 of FY 23/24 saw industry recovery above baseline FY19/20 levels, trending strongly with FY 22/23. Good summer weather drove high interest in outdoor recreation, and much of Mt. Hood Territory's work focused on spreading visitor impact to lesser-utilized recreation assets and encouraging visitor engagement with local communities.

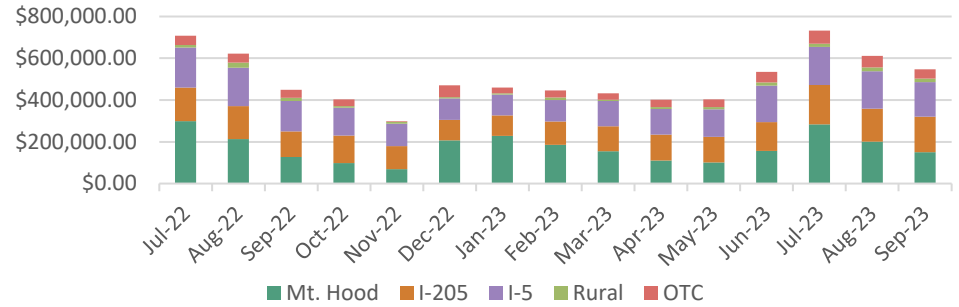
**OF NOTE THIS QUARTER:** The Camp Creek Fire started on August 25 producing visible smoke throughout the region. Emergency operations were active until September 20. The fire resulted in a lot of local awareness and concern but limited closures and evacuations. Sandy Ridge Trailhead was the closure most impactful to tourism. Alert banners were added to mthoodterritory.com and information resources were shared through industry B2B channels.

Clackamas County TRT Earnings



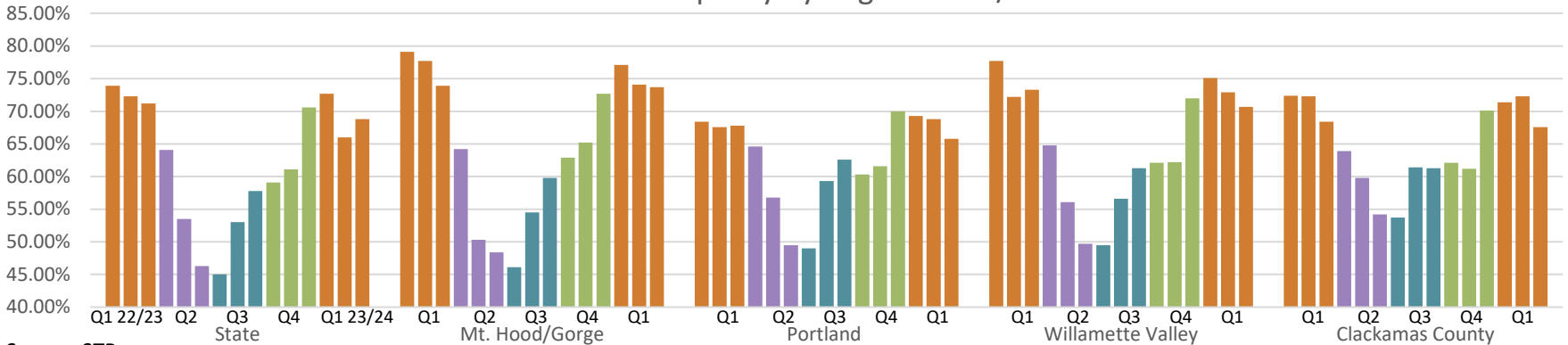
Data Source: Clackamas County Lodging Tax Collections

Clackamas County TRT Earnings by Region



Data Source: Clackamas County Lodging Tax Collections

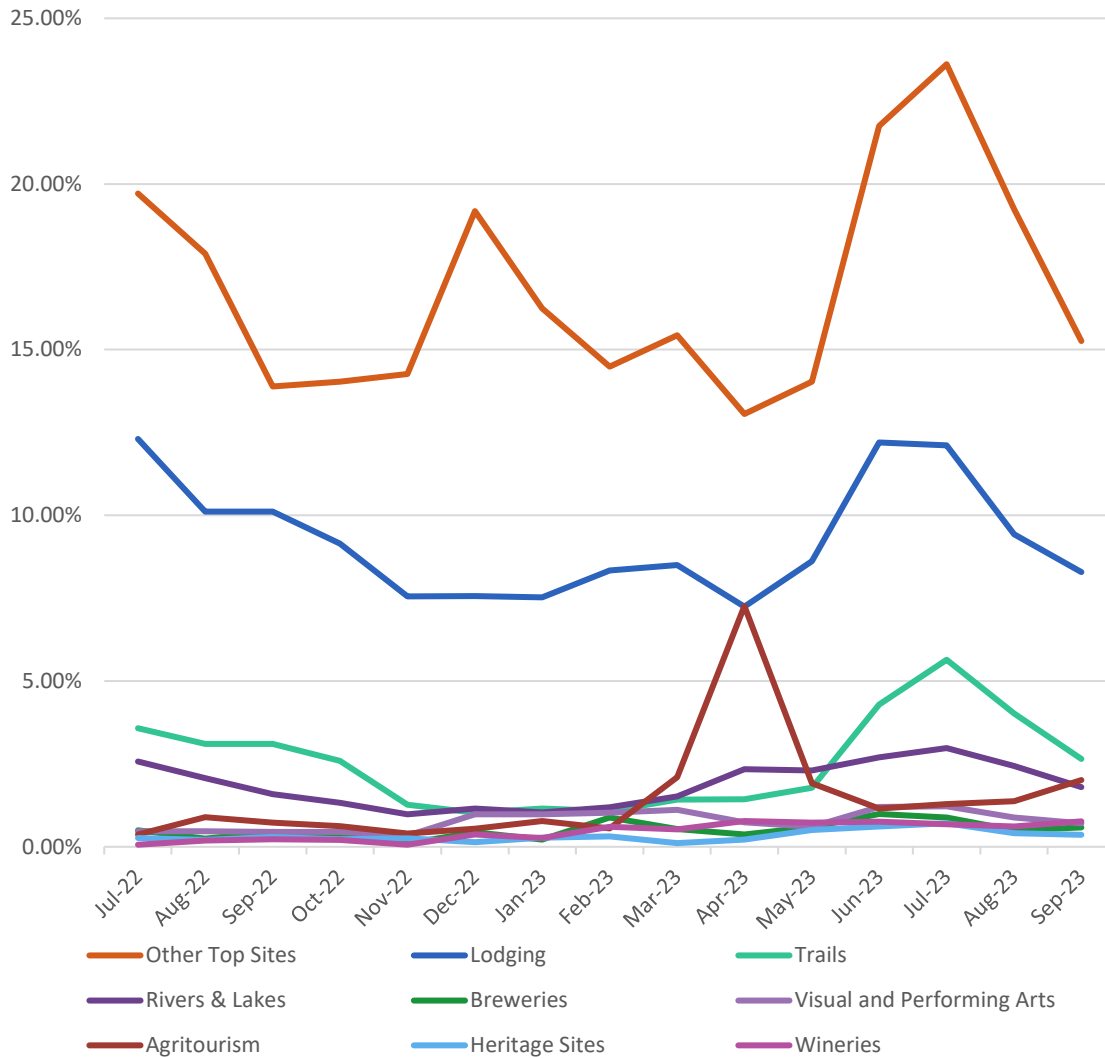
Seasonal Occupancy by Region FY 22/23



Data Source: STR

# Q1 FY 23/24 - VISITOR TRENDS

Percentage of Visitors to Activity Type



Data Source: Datafy

\* From 50+ miles away

\*\* Other Top Sites includes ski resorts and attractions that don't fit other categories

## KEY TAKEAWAYS

- This data tracks the percentage of total visitors\* to Clackamas County who visited certain types of attractions and sites.
- Trails and water sites peak in summer months but visitation drops starting in September
- Agritourism and wineries both see increases starting in September/fall
- Breweries and Heritage sites benefit from July summer visitation

July 23	change YOY	Aug 23	change YOY	Sept 23	change YOY
Other Top Sites 23.61%	↑	Other Top Sites 19.24%	↑	Other Top Sites 15.26%	↑
Lodging 12.11%	↓	Lodging 9.43%	↓	Lodging 8.29%	↓
Trails 5.64%	↑	Trails 4.02%	↑	Trails 2.65%	↑
Rivers & Lakes 2.98%	↑	Rivers & Lakes 2.44%	↑	Agritourism 2.01%	↑
Agritourism 1.29%	↑	Agritourism 1.38%	↑	Rivers & Lakes 1.8%	↑
Visual and Performing Arts 1.22%	↑	Visual and Performing Arts 0.88%	↑	Wineries 0.77%	↑
Breweries Cideries Distille... 0.88%	↑	Wineries 0.61%	↑	Visual and Performing Arts 0.71%	↑
Heritage Sites 0.71%	↑	Breweries Cideries Distille... 0.5%	↑	Breweries Cideries Distille... 0.58%	↑
Wineries 0.68%	↑	Heritage Sites 0.41%	↑	Heritage Sites 0.36%	↑

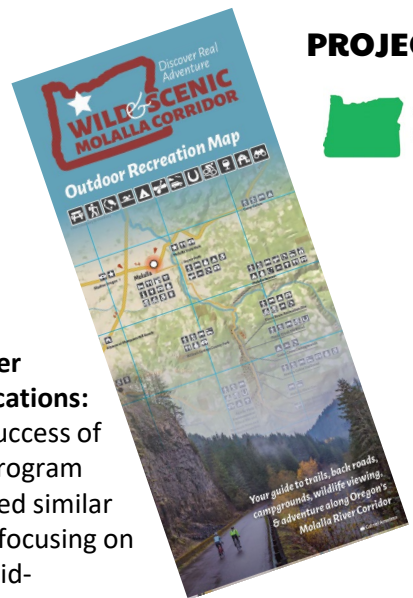
# Q1 FY 23/24 – PROJECT HIGHLIGHTS



## MOLALLA OUTDOOR RECREATION MAP

The Molalla Outdoor Recreation Map work began as part of Travel Oregon's Destination Ready grant program, where it was the highest scoring proposal. The project addressed development and economic impact in the greater Molalla area, addressing our strategic priority of encouraging visitation to lesser-used areas. The Molalla map pushed the boundaries of Travel Oregon's traditional outdoor recreation maps by incorporating a focus on downtown Molalla as well as agritourism partners. Steering committee groups were comprised of city leaders, small business owners and federal land management agencies. The resulting recreation map is now in circulation at over 50 locations throughout the state.

### PROJECT PARTNERS



**Further Implications:** The success of this program inspired similar work focusing on the mid-mountain area.

**CITY OF MOLALLA**

You'll find all kinds of adventure in the forests and farms across the Wild & Scenic Molalla Corridor—and we'll let you know soon enough—but the city of Molalla staff rewards visitors who take time to stroll the cozy downtown core, dive into its historic charms, and embrace a wide range of fun attractions.

- Went to ride a miniature train, die** help, railroad history, or actually... together from more than three miles up! The railroad is a fun, scenic, and affordable way to enjoy the outdoors in the friendly community.
- Molalla Train Park** Since 1954, Molalla Train Park has offered fun for all ages. Today, the park is a fun, scenic, and affordable way to enjoy the outdoors in the friendly community.
- Skate in Oregon** Enjoy one of the most popular skateboarding events in the Pacific Northwest. Skateboarding is a fun, scenic, and affordable way to enjoy the outdoors in the friendly community.
- Enjoy Molalla** Do you think you and your friends can make it all the way to the top of Mt. Hood? In Molalla, the city's beloved escape route, there's a fun, scenic, and affordable way to enjoy the outdoors in the friendly community.

**Molalla Museum Complex** Since time immemorial, the Molalla people have hunted, fished, foraged, and lived in and around present-day Molalla. There are many historic structures, artifacts, and artifacts that tell the story of the Molalla people and their way of life. The Molalla Museum Complex is a fun, scenic, and affordable way to enjoy the outdoors in the friendly community.

**Molalla Badlands** The famous Molalla Badlands have been showcasing some of the country's best rock art for nearly 10,000 years. The badlands are a fun, scenic, and affordable way to enjoy the outdoors in the friendly community.

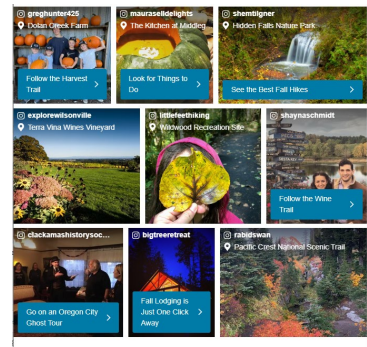
**Enjoy a Hiking walk** Check all over Molalla because there are many beautiful hiking trails. The trails are a fun, scenic, and affordable way to enjoy the outdoors in the friendly community.

**Share the love** Share the love of the outdoors with your friends and family. The outdoors are a fun, scenic, and affordable way to enjoy the outdoors in the friendly community.



## CROWDRIFT STRATEGY

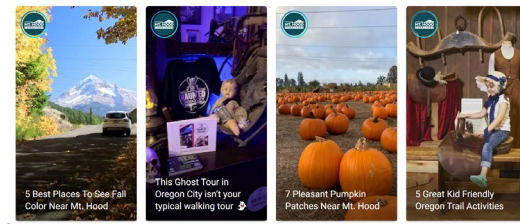
Mt. Hood Territory is using Crowdriff, a visual marketing tool, to integrate user-generated content (UGC) into our website and content strategy. UGC galleries across our website feature images from Instagram users that inspire visitors and link back to Mt. Hood Territory's priority messages. We also have galleries of short-form videos that appear on our site and Google Search and Discover, helping increase organic traffic to our website and boost our search engine optimization (SEO) ranking. All of this content is repurposed and leveraged across our social media channels, including Facebook, Instagram and Youtube.



Incorporating selected crowd-sourced imagery and short-form video showcases Mt. Hood Territory in an authentic way, resonating with both visitors and locals alike. It also helps us bring in more diverse voices and representation throughout the area, addressing our strategic priority of enhancing the awareness of Mt. Hood as a safe and inclusive destination.

**50,000** Over 50,000 engagements with UGC image galleries.  
**115,000** Over 115,000 impressions on Google from short-form galleries

### Visual Stories





# Q1 FY 23/24 – PROJECT HIGHLIGHTS



## CLACKAMAS RIVER ALTERNATIVE FLOATS

The goal of the project was to mitigate the impacts of excessive visitation at Barton Park and alleviate traffic congestion on roadways leading to the park during summer floating season. The project team consisted of staff from Tourism and the Operations Management team at County Parks. Together Parks and Tourism crafted messaging used by Tourism to create signs, cards, QR codes, social media posts and informational pieces that directed people to the Alternative Floats webpage with information about how to avoid crowds and recreate safely on the Clackamas. Parks staff utilized the tools and messaging to improve the experience for park visitors and reduce impacts on the road from May – September 2023.



# 8,139

views

# 2,440

conversions



In person QR code scans

At Barton Park **660**

Bonnie Lure (alt) **18**

Dog Creek Trail (alt) **14**

Parks Department staff reported that they saw a **50%** reduction in traffic and wait times to get into Barton Park vs. prior year peak visitation days. Wait times had been sometimes 3-4 hours and were cut to 1-1.5 at worst.



## HOSPITALITY THANK YOU PROJECT



For the third annual year, the Experience Mt. Hood and the Gorge RDMO partnered with local DMOs in the region to disseminate thanks and appreciation for all the front line hospitality workers in the region. DMOs, including Mt. Hood Territory, went door to door at each tourism business passing out cookies for staff and a thank you card connecting their work to the millions of visitors that come to our region each year.

# 2,440

**COOKIES DISTRIBUTED**

# 334

**BUSINESSES REACHED**



# Q1 FY 23/24 - PROJECT HIGHLIGHTS



## DATAFY MARKETING PARTNERSHIP

Mt. Hood Territory harnesses the power of “big data” insights for the destination through Datafy. In Oct 2022, we started using Datafy’s digital advertising platform that builds high-quality target audiences based on previous visitation and visitor behavior then serve ads across vetted websites and apps. The platform also offers a variety of ad types, furthering our targeting capabilities, such as serving real-time Otter Do ads promoting Take Care Out There tips to visitors while they’re in the destination.

We’re now seeing results from this hyper-targeted approach. Datafy provides a previously unattainable level of measurement to evaluate return on investment by offering physical visitor attribution. We can see “on the ground” return on ad spend in our communities with attribution numbers for destination visits and lodging. Datafy determines campaign advertising attribution by comparing a target audience control group who did not see Datafy ads and an

experimental group who did. Looking at the FY22-23 campaign three months out, every \$1 of advertising spent resulted in visitors from over 50 miles spending \$185 in Clackamas County communities.

**\$185.45 : \$1**  
ROAS

**Further Implications:**  
Soon we will have access to this type of attribution information across other digital channels through Datafy’s tracking pixels, offering us the best of all worlds — a diversified media mix with real-world attribution numbers.

### Clackamas OR - 2022 -23 Annual Campaign

**ADR**

\$120

**Spend per Visitor**

\$291

Campaign Run Dates: 10.14.22 - 06.30.23  
Report Period 10.14.22 - 09.30.23  
Attribution Mileage 50 - 2698 mile radius

---

**Attribution**

**Destination**      Total Trips / Visits  
**74,354**

Est. Campaign Impact  
**\$21,637,014.00**

**Lodging**              Est. Room Nights  
**3,023**

Est. Campaign Impact  
**\$362,760.00**

Attribution reflects visitation between  
2022 -10-21 - 2023 -09-30

\$

**Est. Campaign Impact**  
**\$21,637,014**

\$

**Est. ROAS**  
**\$185.45 : \$1**

👁️

**Total Impressions**  
**12,023,084**

🖱️

**Total Clicks**  
**27,228**

▶️

**Total Video/Audio Completions**  
**458,457**

\$

**Total Spend**  
**\$116,670.36**

© Datafy - All Rights Reserved  
Advertising visitor attribution represents a raw device count of the campaign's ad-exposed visitors observed in market and is not extrapolated.

# Q1 FY 23/24 - METRIC HIGHLIGHTS

## PRIORITY MESSAGES

With much of Q1 falling in Mt. Hood Territory's summer peak season, priority messages focused on safety and visitor flow while encouraging economic impact by highlighting small businesses, events and Main Streets. Several messages also directly tied into Travel Oregon's and Mt. Hood Territory's product development and regenerative travel work.

### Message Highlights:

- Summer page
- Heritage Trail
- Wine Trail
- Willamette River to Main Streets
- Molalla (including new Molalla Outdoor Recreation Map)
- Clackamas River alternative floats
- Otter Dos/Take Care Out There
- Tour guides and outfitters/Why Guides



**25,381,385**  
Impressions



**3,209,106**  
Engagements



**70,842**  
Partner Conversions

## OPTIMIZATIONS & LEARNINGS

Through work with our SEM agency, Deksia, we've found that Google suppresses our alcohol-related ads since our website does not include an age gate requiring visitors to confirm they're 21+ before browsing. After attempting several modifications to Google Ads, we've refocused our Tap Trail and Wine Trail promotion to channels without these constraints, such as Datafy digital advertising and social media. We are continuously collaborating with destination partners promoting alcohol content without an age gate on their websites and will update strategies according to future learnings.



Twill Cellars, West Linn

## PARTNER ENGAGEMENT

Q1 included outreach for promotion on TravelZoo, finalizing and distributing the county Bike Map, and listing updates for lodging properties and summer/fall agritourism experiences, among others.



- Agritourism
- Recreation
- Food/Beverage
- Retail Shopping
- Lodging
- Heritage
- Art
- Community Organizations
- County Departments

**181**

*Partners actively engaged with via email, phone or in person.*

# Oregon's Mt. Hood Territory Clackamas County Tourism



## TOURISM DEVELOPMENT COUNCIL

### David Penilton – Chair

America's Hub World Tours  
Oregon City

### Luke Spencer – Vice Chair

Clackamas River Outfitters  
Estacada

### Caterine Connall Nyland

Best Western Agate Beach (remote)  
Sandy

### Tessa Koch

TMK Creamery & Distillery  
Canby

### Gail Yazzolino

End of the Oregon Trail Interpretive & Visitor Information Center  
Oregon City

### Holly Pfortmiller

Best Western Plus Rivershore  
Oregon City

### Katen Patel

K10 Hotels, Milwaukie Inn  
Milwaukie

### Samara Phelps - Executive Director

Clackamas County Tourism

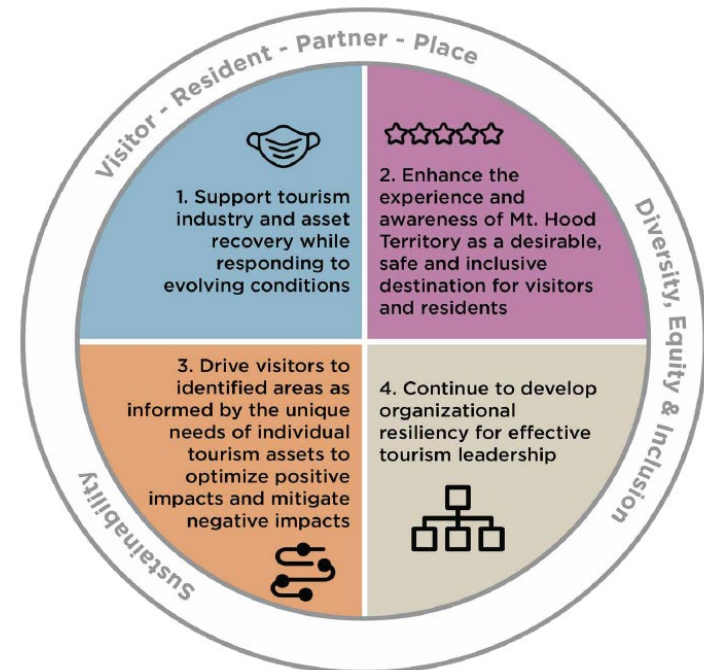
## MISSION

Enhance the quality of life for residents by optimizing the economic impacts of the tourism industry derived from the County's Transient Room Tax.

## VISION

Serve as the leading force to grow and sustain tourism in Clackamas County through effective and efficient marketing and asset development strategies, and by building strong partnerships with businesses, organizations, other governmental entities and citizens.

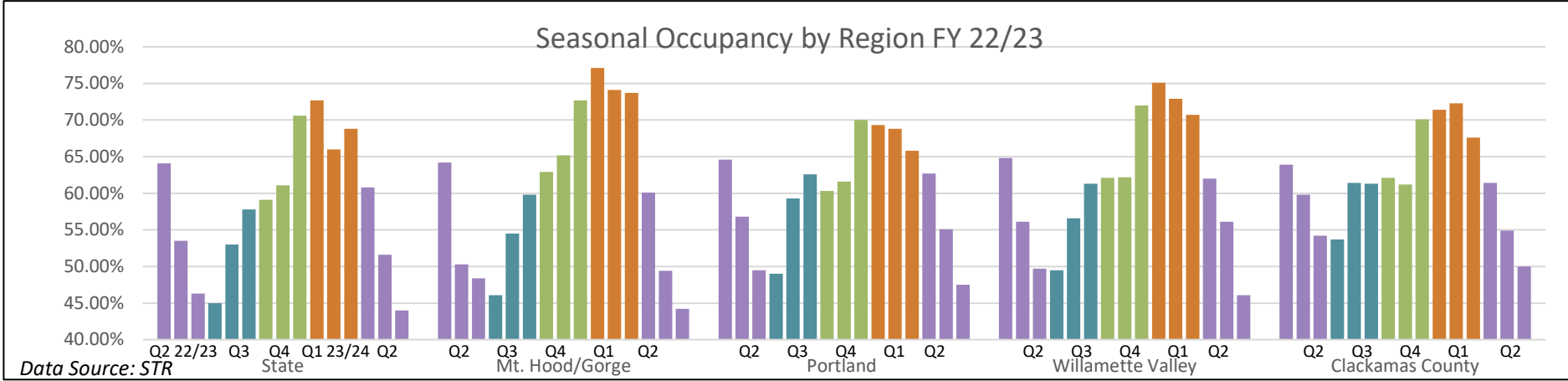
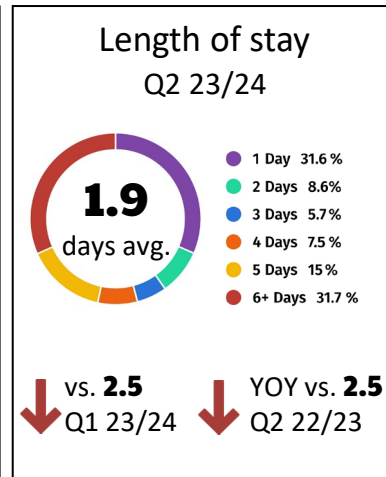
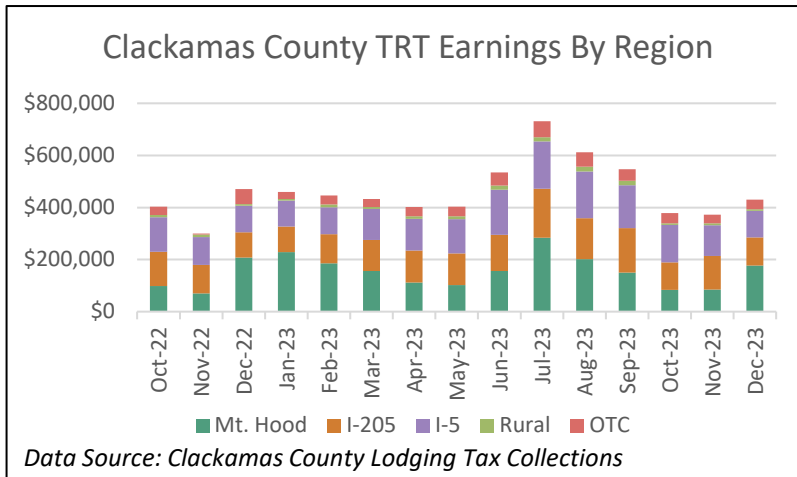
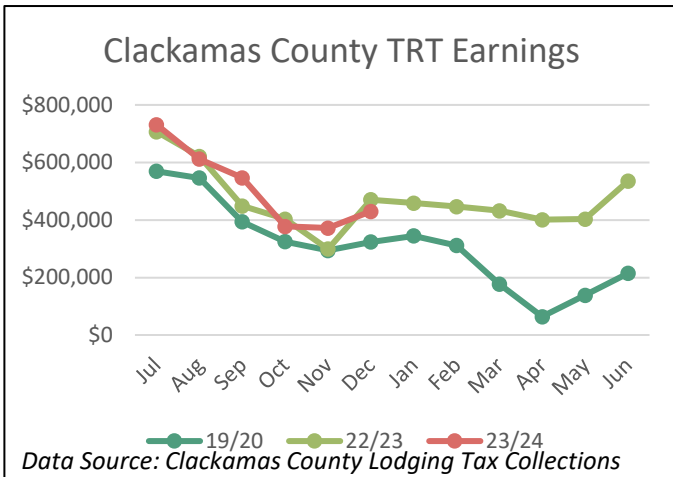
## FY 23/24 STRATEGIC OUTCOMES



# Q2 FY 23/24 QUARTERLY REPORT

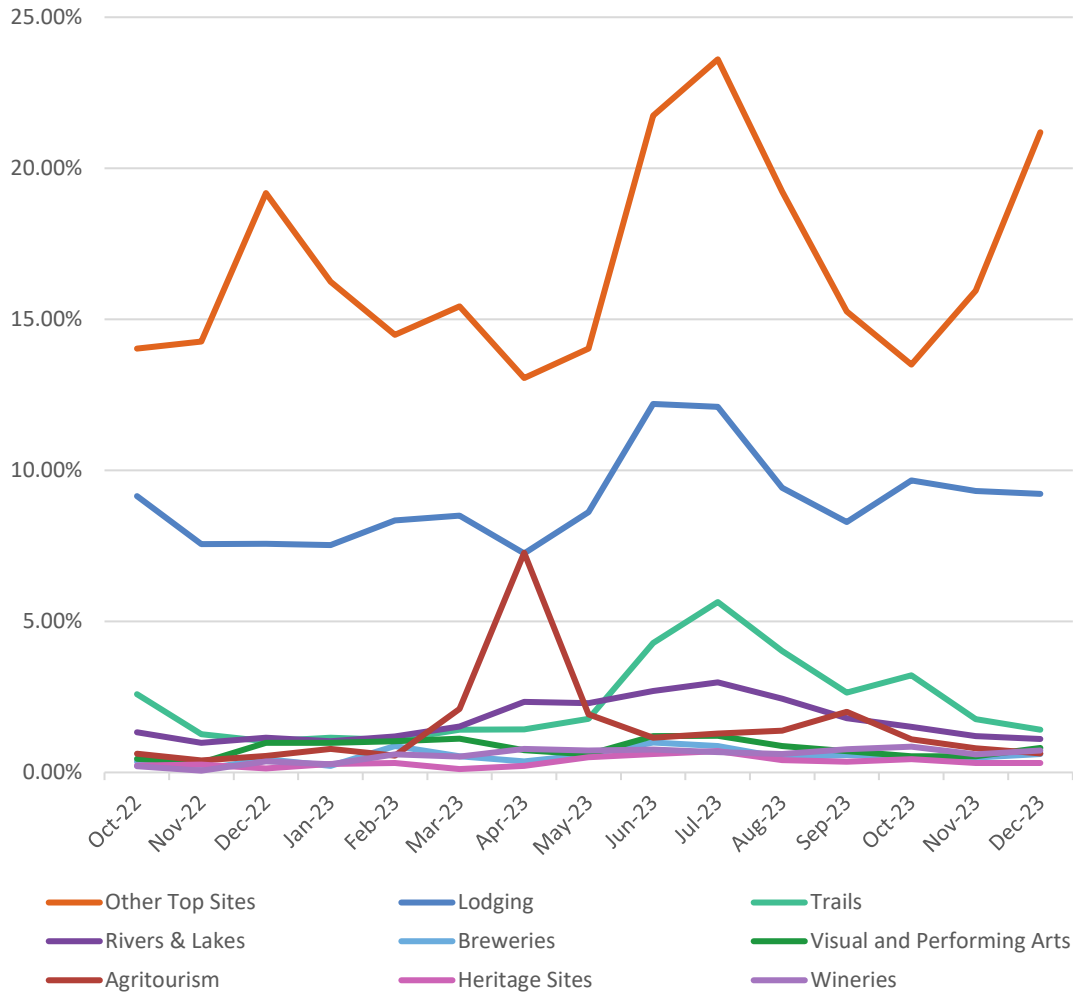
This quarterly report presents industry trends and highlights some of Mt. Hood Territory's key projects during Q2 of FY 23/24, October – December 2023.

**OF NOTE THIS QUARTER:** Q2 marks the beginning of the winter season, but relatively mild weather throughout November and December meant that Mt. Hood was still awaiting snow to open ski areas at the end of the quarter.



## Q2 FY 23/24 - VISITOR TRENDS

Percentage of Visitors to Activity Type



Data Source: Datafy

\* From 50+ miles away

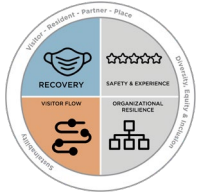
\*\* Other Top Sites includes ski resorts and attractions that don't fit other categories

### KEY TAKEAWAYS

- This data tracks the percentage of total visitors\* to Clackamas County who visited certain types of attractions and sites.
- Agritourism drops in December after fall harvest season concludes and Visual and Performing Arts Sites has a boost in December, likely as more holiday performances take place during that period.
- YOY increases across activity types don't necessarily reflect more visitors but shows that visitors were likely to engage in activities across different categories.

Oct 23	change YOY	Nov 23	change YOY	Dec 23	change YOY
Other Top Sites 13.5%	↓	Other Top Sites 15.95%	↑	Other Top Sites 21.2%	↑
Lodging 9.67%	↑	Lodging 9.32%	↑	Lodging 9.22%	↑
Trails 3.22%	↑	Trails 1.77%	↑	Trails 1.42%	↑
Rivers & Lakes 1.51%	↑	Rivers & Lakes 1.2%	↑	Rivers & Lakes 1.11%	↓
Agritourism 1.1%	↑	Agritourism 0.8%	↑	Visual and Per... 0.81%	↓
Wineries 0.85%	↑	Wineries 0.6%	↑	Wineries 0.73%	↑
Visual and Per... 0.54%	↑	Visual and Per... 0.54%	↑	Agritourism 0.63%	↑
Breweries Cid... 0.51%	↑	Breweries Cid... 0.5%	↑	Breweries Cid... 0.61%	↑
Heritage Sites 0.44%	↑	Heritage Sites 0.31%	↑	Heritage Sites 0.31%	↑

## Q2 FY 23/24 – PROJECT HIGHLIGHTS



### HARVEST TRAIL

After hearing interest from agritourism partners in coming together to help promote each other, Mt. Hood Territory launched a pilot program of the Harvest Trail, a gamified passport connecting fall harvest festivals at 5 local farms. The passport encouraged people to visit multiple farms, participating in activities at each to earn a beanie and provide a Thanksgiving meal to a local family for each completed stamp card. Participating businesses expressed appreciation for the collaboration fostered by program, which supported the agritourism sector and encouraged shoulder season visitation to the destination with visitors from 22 cities and as far away as Puyallup, WA and Riverside, CA.

Throughout October, we promoted the Harvest Trail in local print and news media outlets and social media. It was also picked up by popular local social media accounts focused on family activities. In its first year the program surpassed expectations with 111 completed passports.

Harvest  
Trail  
Youtube  
/Social  
Video

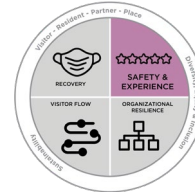


**124** completed passports

**214,000**  
Social Media Impressions

**4,700**  
Social Media Engagements

**5,200+**  
Web page views



### RESIDENT SENTIMENT SURVEY

Mt. Hood Territory conducted a resident sentiment survey. Our last resident sentiment survey was conducted in 2019 as part of our Sustainable Destination Assessment from George Washington University. The 2023 survey followed up on the recommendation for regular resident sentiment monitoring and included questions from 2019 as well as new questions informed by the current tourism landscape.

**1,847**  
Unique  
Responses

**80%**  
Completion  
Rate

**800+**  
Newsletter  
Sign-Ups

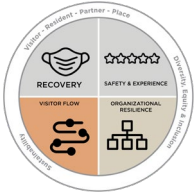
Clackamas County Public and Government Affairs helped us reach beyond our usual audiences, meeting our goal to have each region of the county well represented in responses. Responses from the survey were shared with tourism leads across Clackamas County's cities and regions.

Overall, the survey found that residents felt more negatively towards tourism in 2023 than they did in the original 2019 survey. However, residents still showed a high satisfaction with tourism's benefit, especially for local businesses. The survey also showed that residents felt their personal interactions with visitors were largely positive. The greatest negative impact cited in the survey responses was tourism's effect on the natural environment. Responses will inform the tourism planning process and help monitor destination health.

View the full resident survey responses here:

<https://www.mthoodterritory.com/full-county--final-report.pdf>

## Q2 FY 23/24 – PROJECT HIGHLIGHTS



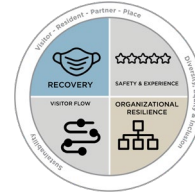
### RESEARCH SHARING & COMMUNITY TOURISM LEAD MEETING



Community Tourism Lead/TDC Meeting

To serve as a resource for our local tourism community, Mt. Hood Territory shares our data with partners and community tourism leads. In Q2, we invited tourism leads from all of our communities as well as the Tourism Development Council to a joint meeting to share recent research, including our 2023 resident sentiment survey and destination insights from Datafy. Research findings were presented for the full county as well as divided into urban, mountain and valley regions for discussion with our community stakeholders.

To spread the benefits of our research and data to even more partners, Mt. Hood Territory and the Mt. Hood Gorge Region started hosting “research office hours.” Partners can book an appointment to dive into visitor trends for their specific site or community using Mt. Hood Territory’s contract with Datafy and the Mt. Hood Gorge Region’s contract with Placer.ai, a similar first-party data tracking platform.



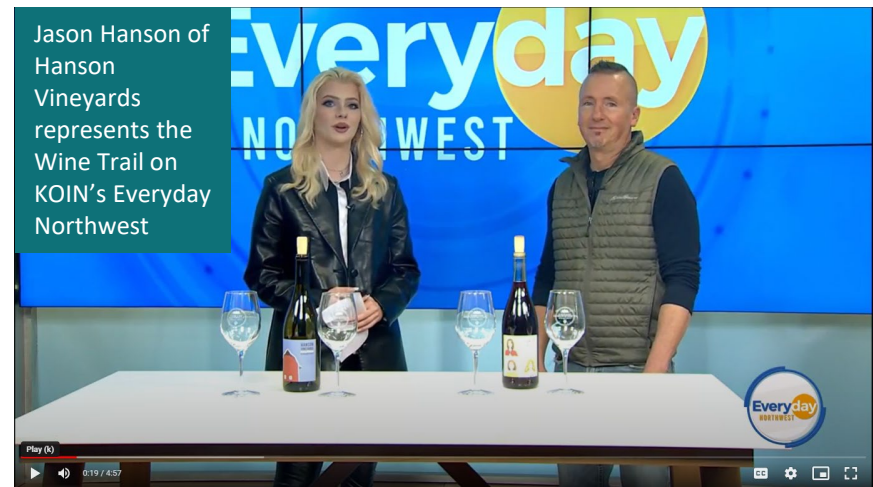
### PARTNER PR MEDIA TRAININGS

Giving partners the opportunity to represent Mt. Hood Territory tells an authentic story of our destination by incorporating diverse voices. Beginning in Q2, we are now providing complimentary media training to partners that are invited to participate in broadcast opportunities through our contract with Lawrence PR. Media trainings help partners gain confidence and skills relevant beyond their media appearance with Mt. Hood Territory.



Media training is the most important way to ensure your message is being articulated clearly and concisely. Media training gives a spokesperson confidence, knowledge and the on-camera skills needed to provide a great interview for the media. The Lawrence PR team, many of them former journalists, are experts in the field and know exactly what the media needs to produce a good story.

*-Lawrence PR*





## Q2 FY 23/24 - METRIC HIGHLIGHTS

### PRIORITY MESSAGES

Our Q2 timeframe fell over one of Mt. Hood Territory's two shoulder seasons, so most of the messaging effort went toward supporting tourism industry recovery, our first strategic outcome. We promoted timely small businesses, such as museums, art galleries, family farms and local boutiques and restaurants. Several messages tied into the organization's product development work, such as our Adventure Trails. We also uplifted individual community efforts.

#### Message Highlights:

- Fall page
- Harvest Trail
- Tap Trail
- Oregon Trail for kids
- Holiday shopping
- Art galleries
- Highway 26 dining
- Sandy's covered patios



**30,969,638**

Impressions



**1,603,470**

Engagements



**46,012**

Partner Conversions

### DATAFY MARKETING ATTRIBUTION

Datafy captures behaviors of visitors who were served our ads then traveled to the destination. The below attribution numbers show results of our advertising during Q2.



**9,502**

Room Nights



**\$21,564,597**

Visitor Spend



**\$602.07 : \$1**

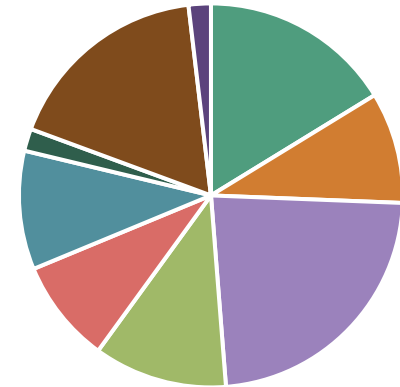
ROAS (Return on Ad Spend)

### OPTIMIZATIONS & LEARNINGS

To boost consumer newsletter engagement, streamline our email list and ensure compliance with Google's stricter 2024 bulk emailer standards, we tackled email hygiene in Q2. We launched an incentivized email campaign to re-engage inactive subscribers and gather valuable user feedback about our monthly newsletter while removing inactive users. For an optimized user experience, we are A/B testing newsletter designs. A more responsive audience paves the way for future campaign success.

### PARTNER ENGAGEMENT

Q2 included outreach around the Harvest Trail and Christmas tree farms, sharing research with community tourism groups, and updates to the shopping category of the website listings.



- Agritourism
- Recreation
- Food/Beverage
- Retail Shopping
- Lodging
- Heritage
- Art
- Community Organizations
- County Departments

**160**

*Partners actively engaged with via email, phone or in person.*

# Oregon's Mt. Hood Territory Clackamas County Tourism



## TOURISM DEVELOPMENT COUNCIL

### David Penilton - Chair

America's Hub World Tours  
Oregon City

### Luke Spencer - Vice Chair

Clackamas River Outfitters  
Estacada

### Caterine Connall Nyland

Best Western Agate Beach (remote)  
Sandy

### Tessa Koch

TMK Creamery & Distillery  
Canby

### Gail Yazzolino

End of the Oregon Trail Interpretive & Visitor Information Center  
Oregon City

### Holly Pfortmiller

Best Western Plus Rivershore  
Oregon City

### Katen Patel

K10 Hotels, Milwaukie Inn  
Milwaukie

### Samara Phelps - Executive Director

Clackamas County Tourism

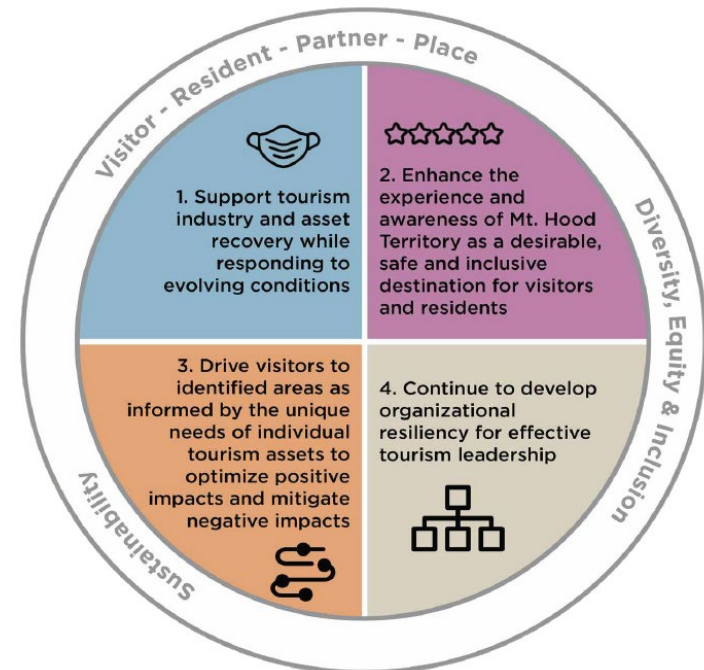
## MISSION

Enhance the quality of life for residents by optimizing the economic impacts of the tourism industry derived from the County's Transient Room Tax.

## VISION

Serve as the leading force to grow and sustain tourism in Clackamas County through effective and efficient marketing and asset development strategies, and by building strong partnerships with businesses, organizations, other governmental entities and citizens.

## FY 23/24 STRATEGIC OUTCOMES



**EXECUTIVE SUMMARY**

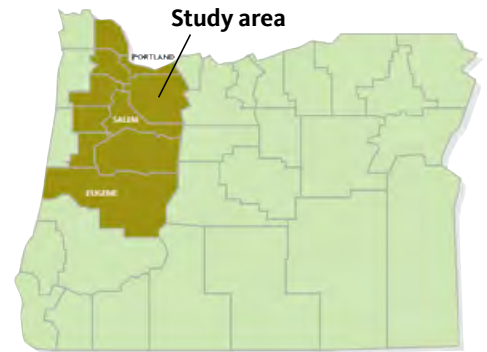
# An Initial Economic Impact Estimate of Agritourism in Oregon's Willamette Valley

**Bruce Sorte, Melissa Fery and Audrey Comerford**

In agritourism, producers combine farming with some aspects of tourism. Agritourism can take the form of farm-direct sales, education, entertainment, outdoor recreation and hospitality. Surveys tell us that farmers take up agritourism to:

- Increase income.
- Create a sense of community.
- Educate visitors about farming.
- Share farm products and farm with others.

This analysis sought to quantify the potential value that agritourism may provide to Willamette Valley farmers and their communities. Based on our surveys, farmers offering agritourism may earn 50% of their gross revenues and 50% of their net revenues or profits from agritourism. These producers diversify their income sources, which protects against economic fluctuations.

**Key takeaways for farmers and policymakers**

- Agritourism is diverse, and many farmers provide several agritourism products and services, which range from selling produce at farm stands to on-farm lodging and school visits to farms.
  - A majority (66%) of agritourism customers and visitors live within 50 miles of the farms. One-third of consumers come from more than 50 miles away for day (19%) and overnight visits (15%) to the area. (Estimates include one-time and repeat visitors.)
  - Approximately 22% of Willamette Valley farms produce one or more types of agritourism products and services.
  - When we total the economic effects of agritourism sales, daytime visitor spending and overnight visitor, direct sales exceed \$985 million. Value-added sales (sales minus outside supply or production inputs) exceed \$572 million.
  - Agritourism supports, in full and part-time jobs, approximately 9,000 jobs on farms and contributes to approximately 2,000 jobs in both rural and urban communities.
  - Between 3.7 million and 13.7 million people visit agritourism farms annually.
- ▶ **Survey participants overwhelmingly indicated that agritourism was important to their financial viability and their efforts to help people appreciate the importance of farming.**

This project was sponsored by Travel Oregon, Lane County Community and Economic Development, Mt. Hood Territory, Willamette Valley Visitors Association, SEDCOR and the OSU Extension Service in Benton, Clackamas, Lane, Linn, Marion, Polk and Yamhill counties.

© 2024 Oregon State University. Extension work is a cooperative program of Oregon State University, the U.S. Department of Agriculture, and Oregon counties. Oregon State University Extension Service offers educational programs, activities, and materials without discrimination on the basis of race, color, national origin, religion, sex, gender identity (including gender expression), sexual orientation, disability, age, marital status, familial/parental status, income derived from a public assistance program, political beliefs, genetic information, veteran's status, reprisal or retaliation for prior civil rights activity. (Not all prohibited bases apply to all programs.) This publication will be made available in an accessible alternative format upon request. Please contact [puborders@oregonstate.edu](mailto:puborders@oregonstate.edu) or 1-800-561-6719.

**DOWNLOAD THE FULL REPORT** →**EM 9421-ES | FEBRUARY 2024**For details on these statistics, read the full report, <https://beav.es/qtw>

# AN INITIAL ECONOMIC IMPACT ESTIMATE OF AGRITOURISM in Oregon's Willamette Valley



**Oregon State**  
University



---

## TABLE OF CONTENTS

<b>Abstract</b>	3
<b>Introduction</b>	4
<b>Defining agritourism</b>	5
<b>Surveys used to collect a sample of local data</b>	7
Table 1. Farms by county	8
Table 2. Farms by acreage size	8
Table 3. Number of years farms have engaged in agritourism	8
Table 4. Primary agritourism service or product	9
<b>Why start agritourism</b>	9
Table 5. Ranked motivations for starting an agritourism enterprise	9
<b>Surprising results of agritourism</b>	9
Table 6. Documented Surprises from On-farm Agritourism	9
<b>Methods used to estimate the economic effects of agritourism</b>	10
<b>Key terms</b>	12
<b>Economic footprint of agritourism</b>	12
<b>Agritourism industry</b>	12
Table 7. Willamette Valley agritourism farms — number and visitors	14
<b>Economic effects of agritourism sales</b>	15
Table 8. Agritourism sales	15
Table 9. Economic effects of agritourism production	16
<b>Economic impacts of agritourism: consumers from more than 50 miles away (day visitors)</b>	16
Table 10. Day visitor expenditures	17
Table 11. Economic impacts of agritourism day visitors	17
<b>Economic impacts of agritourism: consumers from more than 50 miles away (overnight visitors)</b>	17
Table 12. Overnight visitor expenditures	18
Table 13. Economic impacts of agritourism overnight visitors	18
<b>Comparing agritourism and other marketing channel farm sales</b>	18
<b>Maintaining good relationships between agritourism farms and other rural landowners</b>	19
<b>Summary</b>	20
<b>Appendix: An example of how agritourism may be expanded</b>	21
<b>End notes</b>	22

---

---

## Authors and acknowledgments

Bruce Sorte, Extension Economist (retired), Department of Applied Economics at Oregon State University. Melissa Fery, Associate Professor (Practice), Small Farms Extension, Department of Crop and Soil Science at Oregon State University. Audrey Comerford, Agricultural Tourism Program Coordinator, Oregon State University Extension Service.

Correspondence: Bruce Sorte, Bruce.Sorte@oregonstate.edu, 541.231.6566

The authors would like to thank Daniel Bigelow with Oregon State University's Department of Applied Economics for his sharing of ideas and knowledge for this study. We also appreciate the time spent and very useful suggestions of six reviewers who did so anonymously. This project was graciously sponsored by Travel Oregon, Lane County Community and Economic Development, Mt. Hood Territory, Willamette Valley Visitors Association, SEDCOR and the OSU Extension Service in Benton, Clackamas, Lane, Linn, Marion, Polk, and Yamhill Counties.

All photos by Audrey Comerford, © Oregon State University.

---

## Abstract

By researching agritourism's economic effects on Oregon farms and our communities, this study explores how agritourism can diversify farming businesses. We reviewed existing agritourism data and supplemented our analysis with two surveys and knowledge from industry experts, producer associations and the authors. This report was created for Oregon partners and organizations interested in agritourism. It should not be used to make precise estimates for other study areas without gathering the descriptive data referenced above.

Our estimates suggest:

- ▶ Agritourism is very diverse, and many farmers provide several agritourism products and services, which range from selling food at farm stands to on-farm lodging. Agritourism consumers are primarily people living within 50 miles of the farms. However, approximately a third of consumers come from more than 50 miles away for day (19%) and overnight visits (15%) to the area.
- ▶ Approximately 4,000 of the total number of 18,679 farms in the Willamette Valley may be engaged in agritourism.
- ▶ Producers that diversify with agritourism may increase their sales and financial resilience, potentially spreading almost half of their gross and net revenues between the wholesale and agritourism portions of their operations.
- ▶ When the economic effects of agritourism sales (Table 9), day visitor spending (Table 11), and overnight visitor spending (Table 13) are totaled, the direct sales exceed \$985 million and the value-added (sales minus outside inputs similar to GDP) exceed \$572 million.
- ▶ The employment impact, including full- and part-time jobs, is near 11,000 jobs — calculated from the combined total of agritourism employment (Table 9), day visitor employment (Table 11), and overnight visitor employment effect (Table 13).
- ▶ Depending on whether the median of survey responses or the adjusted average of survey responses is used for estimating the number of agritourism visits there may be between 3.7 million and 13.7 million visits annually. Agritourism is a way that both urban and rural residents can engage with farming and rural activities in the Willamette Valley.

Agritourism lacks a common definition and data. Most of the data required for agritourism does not need to be based on experiments or trials. Instead, Oregon's agritourism needs a foundation of descriptive data, including an inventory of agritourism farms by county, a summary profile of those farms' production and enterprise budgets, consumer research that identifies products and services that customers purchase from agritourism farms and other vendors as part of their trips to agritourism farms, and an inventory of each county's agritourism-related regulations. If you have questions about this study or plan to undertake a similar study, we would be glad to visit with you about what we learned.

---

## Introduction

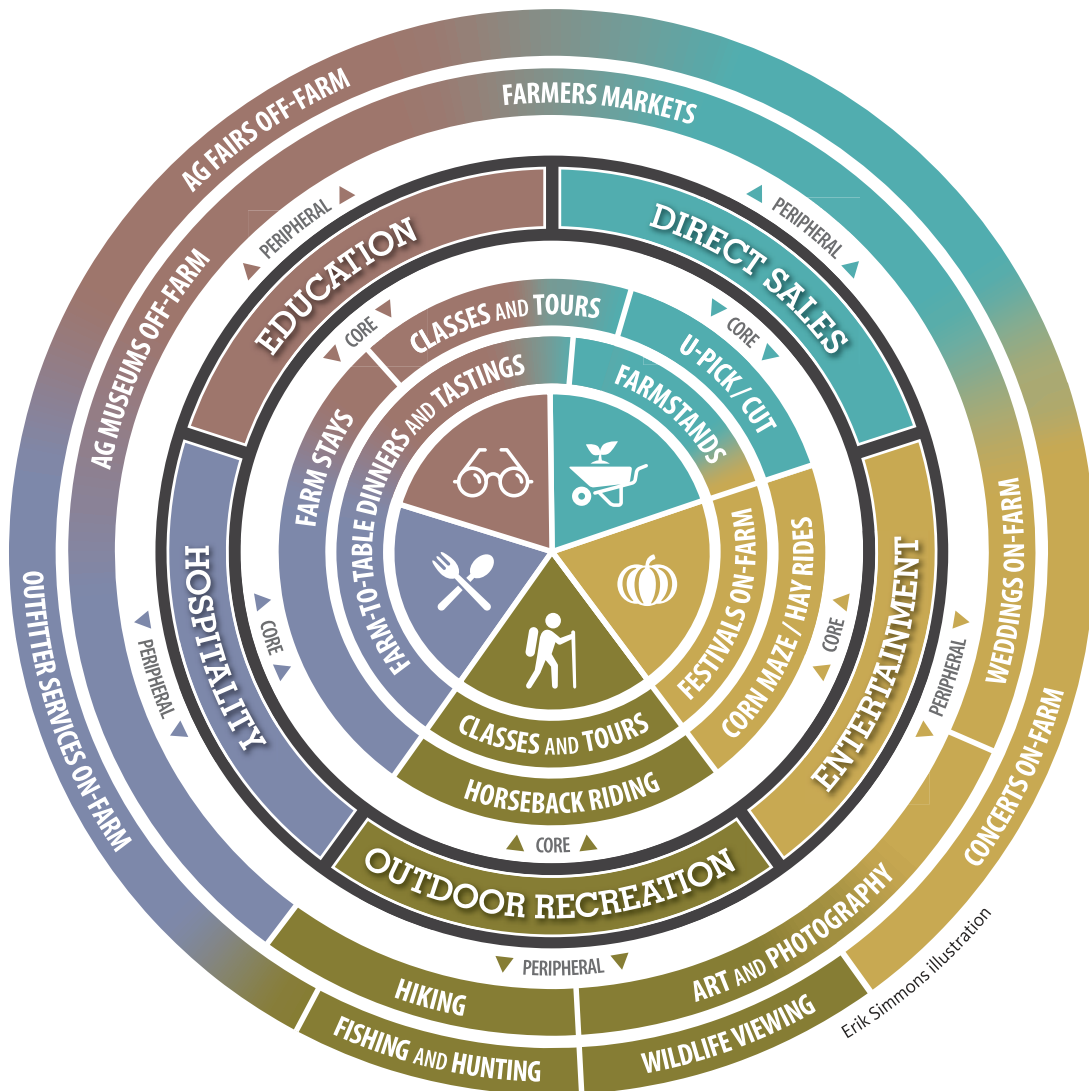
Agricultural commodity markets are typically characterized by many individual farms producing similar outputs. The competitive nature of agricultural production makes it difficult for producers to charge prices that allow them to sustain long-run profits. Producers may benefit from diversifying their revenue sources to differentiate themselves and boost their bottom lines.<sup>1</sup> One potential opportunity for farmers to address these challenges is through various forms of agritourism, a term encompassing a broad suite of activities. For this study, we used a 2021 national agritourism survey, in which Oregon participated, to inform our agritourism framework. It includes farm-direct sales, education, entertainment, outdoor recreation and hospitality.<sup>2</sup>

This report details an economic study of agritourism in the Willamette Valley region of Oregon, which includes the following nine counties: Benton, Clackamas, Lane, Linn, Marion, Multnomah, Polk, Yamhill and Washington. While vineyards and wineries are a major contributor to agritourism in the Willamette Valley, these agritourism activities are already well established and widely adopted<sup>3</sup>. For this reason, our study focuses on all other types of operations and their agritourism products and services in the Willamette Valley. Original survey data collected for the study sheds light on the importance of agritourism and highlights the diverse offerings across the region. Using economic input-output analysis informed by the survey results and the 2017 Census of Agriculture for Oregon, this report estimates the economic effects of agritourism for farmers and local communities in the Willamette Valley. Our findings provide policy-relevant insights into the role that agritourism could play in shaping the character and economic well-being of farmers and rural communities in the years to come.



## Defining agritourism

Agritourism refers to how farmers generate income, as noted above, by directly selling goods to customers visiting the farm. This includes farm-direct sales of unprocessed and farm processed agricultural products, and services to consumers in education, entertainment, outdoor recreation, and hospitality. Throughout much of agriculture’s history, this is how farmers marketed traditional agricultural products. The advent, development and widespread adoption of refrigeration brought about a significant change in the industry.<sup>4</sup> As a result, wholesale trade, processing and retail trade gradually claimed a larger portion of the food dollar, while direct sales from farmers to consumers declined significantly, becoming more of an exception than the norm. This shift in marketing practices led to a growing disconnect between producers and their customer base, as consumers became gradually more distanced from farming — and more broadly — the rural lifestyle. As a consequence, the ability of consumers to personally visit a farm has transformed into a special experience akin to tourism. Over time, agritourism as a concept has grown to encompass a wide range of services and experiences, including on-farm meals and events, farm stands, lodging, hunting/fishing, food tasting, pumpkin patches and “u-pick” opportunities.





---

Over the past century, Oregon's population has become increasingly urbanized, with fewer and fewer people living on farms. Remaining producers have a greater ability to give people an authentic farm experience through agritourism.<sup>5</sup> In many ways, this makes agricultural producers similar to the owners of nonfarm businesses, which throughout modern history, have adapted to new market circumstances by changing and diversifying their products and services. A large proportion of farming families already diversify their business revenue streams through off-farm earnings that support farm household finances, which is a particularly important source of income for smaller farms.<sup>6</sup> Agritourism could introduce a new stream of on-farm income that decreases the reliance of farming families on off-farm income.

Farms have also become more specialized, relying on scientific advances (such as in machinery and seed technology) and the resulting increases in productivity to maintain revenues. Scale economies in agricultural production, among other factors, mean that larger farms have a greater advantage in using technological advances and making necessary investments in equipment, land and other farm inputs.<sup>7</sup> As a result, agricultural production for many commodities has become increasingly consolidated.<sup>8,9,10</sup> For example, consider our study area of the Willamette Valley. Since 1950, there has been a clear increase in large (500+ acres) farm acreage coinciding with a decline in mid-sized (100-499 acres) farm acreage. Specifically, mid-sized farm acreage declined by 74% between 1950 and 2017, while large farm acreage increased by 30%.<sup>11</sup> At roughly 850,000 acres in total, large farms now account for more than half of all farmland in the Willamette Valley.

Smaller farms typically lack the scale associated with modern large-scale commodity production, making diversification of revenue streams like off-farm income more important. Agritourism has a similar potential to diversify a producer's on-farm revenue streams. While agritourism may provide benefits to farms of all sizes, its potential to produce a more robust farm revenue stream may be more beneficial and appealing to small and mid-sized producers.<sup>12</sup>



The additional revenue from agritourism may also bolster the resilience of farming operations and the communities that rely upon them to prevent the conversion of farmland to nonfarm uses, such as residential housing. Resilience is the ability to bounce back quickly from a shock, such as an unanticipated drop in wholesale prices, the cancellation of a processor contract or a severe weather event. Diversification in farming operations and other types of business often allows the farmer to bounce back from a shock in one area by offsetting losses with gains in another area.

According to the 2017 USDA National Resources Inventory, Oregon lost about 242,000 acres of cropland, pastureland and rangeland to development between 1982 and 2017.<sup>13</sup> This occurred despite the protections afforded to Oregon's agricultural landowners through the establishment of exclusive farm use zoning in the 1960s and the implementation of urban growth boundaries brought about by a 1973 law.<sup>14</sup> Earnings from farm-related activities will rarely be sufficient to offset the lucrative financial returns that could be gained from development. However, by bolstering farm-related income, agritourism could increase the likelihood of producers retaining farmland in its current use and creating a more viable farm succession strategy. Agritourism may also strengthen urban-rural connections and foster social support for maintaining a healthy agricultural sector in Oregon.

Our report provides new insight into how different types of agritourism may add resilience to farm operations in the Willamette Valley. However, we acknowledge several caveats. Much more work is necessary to develop a commonly accepted definition of agritourism, an inventory by county of the different types of agritourism farms and services, and a better profile of consumer tastes and preferences related to agritourism.

Although many consider agritourism a positive development for the region, there are competing views. Of particular concern is whether certain agritourism activities, such as lodging, food service and events, are appropriate to be carried out on a farm and whether they run counter to the original intent of Oregon's farmland protection policy framework. Indeed, the number of non-exempt uses of Exclusive Farm Use (EFU) zoned land has increased significantly over the past several decades. While there are potentially legitimate concerns raised about land use

---

conflicts in rural areas, our goal is not to promote agritourism as an industry or suggest that any particular farm should adopt any specific agritourism practices. Rather, we aim to provide economic and other information that may shape and inform both current and future policy debates around agritourism.

---

## Surveys used to collect a sample of local data

Due to the varying definitions of agritourism and because agritourism operations connect into many economic sectors, we collected local data to supplement the modeling program and Census of Agriculture data. Localized agritourism data does not exist in a central location. To overcome this gap in data availability, we conducted an agritourism inventory with publicly available sources. Then, we surveyed and interviewed farmers in the study area that currently offer on-farm activities and direct sales.

To begin an inventory of farms offering agritourism, we performed online searches for different types of agritourism activities in the study area and found those operations actively advertising on search engines, websites and social media. We also requested contacts of known agritourism operations from other agriculture-focused OSU Extension colleagues and community partners. Even though the inventory process was as comprehensive as possible, we could not feasibly collect contact information for all agritourism operators in the study area nor did we expect all collected contact information to be accurate.



We developed and distributed an electronic survey administered through Qualtrics with input from an informal advisory group. We used a “snowball” method of sampling for the electronic survey, whereby an initial group of producers were sent the survey link and asked to respond. Additionally, the same survey link was distributed digitally through partner organizations’ communication channels and outreach from OSU Extension Service, community partners including agritourism and farmer networks, local and regional tourism, economic development and agriculture producer organizations. The survey accepted responses for approximately one month, from the first week of February 2023 to the first week of March 2023.

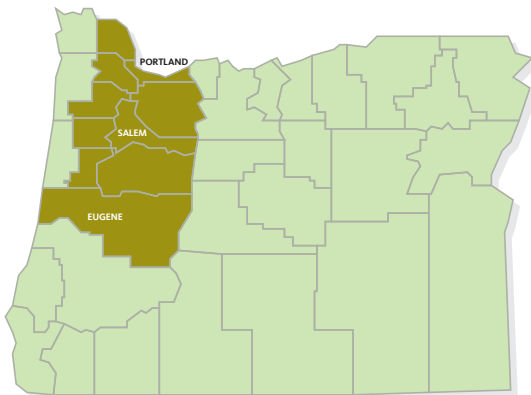
The survey captured the following input data needed for the economic impact analysis modeling:

- ▶ Estimated number of visitors
- ▶ Estimated percentage of visitors who are local and repeat customers, visitors that have traveled more than 50 miles for a day trip, and those traveling more than 50 miles and are likely spending the night in the area
- ▶ Approximate amount of spending for both local and traveling visitors
- ▶ Estimated percentages for gross revenue from agritourism
- ▶ Approximate agritourism costs for labor and the number of additional employees hired for the agritourism enterprise
- ▶ Estimated percentage of total nonlabor agritourism costs calculated from spending on suppliers from the Willamette Valley, other parts of Oregon and outside of Oregon
- ▶ Estimated percentage of the operation’s net revenue (or profit) from agritourism used for annual on-farm production expenses, on-farm capital/land investments, reinvestment in agritourism enterprises and nonfarm purposes

In addition, the survey collected basic farm demographic information, such as location and acreage, and other farm business characteristics, including number of years engaged in agritourism, primary agritourism product or service, seasonality of operating hours, and motivations for starting agritourism alongside farm production.

We received 152 usable online survey responses that included partial and full responses and conducted 10 phone interviews from farms currently offering various types of agritourism in the study area for a total of 162 responses. Of these responses, 140 were complete enough to use for the economic analysis, and all responses were used to characterize agritourism operations. A survey response rate is not available due to the distribution method.

The different number (n) of respondents in the tables represent respondents whose responses were incomplete or did not fit the requested format.



Study area within the state of Oregon

### Characteristics of agritourism operations

The 162 respondents are operating agritourism businesses distributed across the nine counties in our Willamette Valley study area (Table 1).

Most of the farms are small to mid-sized acreages, which is consistent with the size of farms in the Willamette Valley region. Notably, 7% are 200-499 acres and 6% are over 500 acres (Table 2).

More than half of the respondents indicated that agritourism has been part of their farm business for at least 10 years (Table 3). 15% of respondents indicated that they have operated an agritourism enterprise since 2020.

Table 4 provides information about the primary agritourism service or product that farmers in the study area operate. Nearly one-third of respondents reported having a farm stand or farm store as the primary agritourism activity. Other common primary activities included “u-pick/u-cut” operations, vineyards/wineries and nurseries. While data from the vineyards/wineries were not included in the economic analysis, some respondents reported

**Table 1. Farms by county.** n=162

County	Number of Farms	% of Total Operations
Clackamas	34	21
Marion	28	17
Lane	22	14
Yamhill	21	13
Benton	20	12
Polk	15	9
Washington	9	6
Linn	8	5
Multnomah	5	3

**Table 2. Farms by acreage size.** n=162

Farm Acreage	% of Total Operations
1-9	17
10-20	22
21-79	33
80-199	15
200-499	7
500+	6

**Table 3. Number of years farms have engaged in agritourism.** n=151

Years Offering Agritourism	% of Responses
More than 50 years	5
30-49	11
20-29 years	16
10-19 years	20
4-9 years	33
1-3 years	15

vineyards/wineries as their primary form of agritourism. Respondents who chose “Other” indicated activities, such as weddings, photography settings and farm camps, as their primary agritourism service.

### Why start agritourism

We asked producers an open-ended question about their motivation(s) for starting an agritourism enterprise on their farm or ranch. Responses were coded into topic patterns using NVivo software. Producers’ top motivation was additional income that supports the economic sustainability of the farm business. Other motivations spoke to increased social connections with consumers and building community support. These motivations included creating a sense of community, educating visitors about farming, and the joy of sharing their farm and products with others. (Table 5).



### Surprising results of agritourism

The survey also posed an open-ended question allowing respondents to share what they have found most surprising about operating an agritourism business. The coded responses to this question showed three equally surprising factors: (1) agritourism provides learning opportunities for urban visitors, (2) Oregon laws and zoning are not conducive to agritourism, and (3) producers are surprised by how much the public enjoys the rural experience (Table 6). A recent study showed that visiting farms improves adults’ attitudes toward local foods and children gain agriculture literacy after engaging in an agritourism experience (Barbieri et al., 2023).

**Table 4. Primary agritourism service or product. n=161**

Primary agritourism product or service	% of farms
Farm stand or farm store	29
“U-pick” or “u-cut”	14
Vineyard/winery	10
Nursery	9
Educational farm tours	7
On-farm lodging	7
Classes, demonstrations or workshops	5
Other	5
Open farm days	4
Private events	4
Festivals	2
Brewery/cidery	2
Farm-to-table dinners	1
Outdoor recreation	1

**Table 5. Ranked motivations for starting an agritourism Enterprise**

- #1 Increased income
- #2 Creating sense of community
- #3 Educating visitors about farming
- #4 Joy of sharing their farm products and farm with others

**Table 6. Documented surprises from on-farm agritourism**

- #1 Provides learning opportunities for urban dwellers
- #2 Laws and zoning are not conducive for agritourism
- #3 How much the public enjoys the rural experience

---

## Methods used to estimate the economic effects of agritourism

When President George Washington began writing letters to personally gather data about agriculture in 1791 and the United States conducted the first Census of Agriculture in 1840<sup>16</sup>, there was no need to distinguish direct sales to consumers from sales to distributors or processors. Direct sales were the typical form of marketing. As agriculture became more commercialized, the Census of Agriculture started gathering data on direct sales. In the 1974 Census of Agriculture, new questions were added on the different sources of farm-related income and expenses.<sup>17</sup> The 1978 Census of Agriculture then added an explicit question about direct sales to consumers.<sup>18</sup> While the 2002 Census of Agriculture asked about recreational services, a question containing the term agritourism did not appear until 2007, which defined agritourism as wine tours, hay rides, hunting, fishing and other activities.<sup>19</sup> Similar questions appeared in the 2012 and 2017 questionnaires.



We estimated the economic impacts of agritourism in the Willamette Valley using IMPLAN, an economic modeling software program that measures how various projects or policy changes contribute to economic activity (sales, value-added or gross domestic product and jobs) in a specific region, which can range in size from the nation to a ZIP code. The IMPLAN model relies on input-output analysis, which considers the interdependencies between different sectors of an economy. By modeling all economic activity in a defined geographic region, IMPLAN can measure how the activity attributable to a certain project will ripple throughout the entire

economy. The IMPLAN model itself is based on various data inputs, which we supplemented and adjusted using data from our original agritourism survey and publicly available data from the 2017 Census of Agriculture. Our analysis is based on our input data and parameters combined with IMPLAN's most current data set from 2021.

Agritourism data from the most recent (2017) Census of Agriculture is informative but not precise enough to provide the necessary data to estimate the local economic impacts of agritourism for the Willamette Valley. For this reason, we conducted the original agritourism surveys described above to collect the following data:

- ▶ Agritourism farm counts
- ▶ Type(s) of agritourism practices used
- ▶ Farm production for agritourism operations
- ▶ Gross revenue and net revenue (profit) for both the agritourism sales and those sales from other marketing channels
- ▶ Marketing practices
- ▶ Annual visitor counts

To the extent possible, we relied on our data sources and other published studies to generate the input data for the economic impact analysis. However, definitional inconsistencies and limited data availability posed challenges for certain measurements. In a few instances, we consulted with commodity association representatives and used our best judgment to inform the input parameter values.

Economic impact estimates based on IMPLAN or other similar input-output models have received increased skepticism in recent years.<sup>20</sup> These types of studies sometimes pursue a “wow” factor to attract support from policymakers, producing results that may sacrifice credibility. To avoid overstating the economic impacts of agritourism, we were conservative in our calculations.

For example, in one of our data challenges, we could not determine if farmers selling unprocessed food directly to consumers also sold value-added products, such as processed food, to consumers. Furthermore, we could not determine if these producers provided agritourism-related services, such as tours or hunting leases.

The complexity of distinguishing farms' income sources complicated our final tally of agritourism farms in the Willamette Valley. The 2017 Census of Agriculture provided estimates for the number of farms involved in both direct unprocessed food sales and those selling value-added products. To avoid double counting, we only included farms exclusively selling unprocessed food directly to consumers. This assumes that most farms selling processed or value-added food were also selling unprocessed food. However, there is the possibility that some farms selling value-added food do not sell unprocessed food. Therefore, relying solely on the number of farms selling unprocessed foods may underestimate the total number of farms participating in direct sales and agritourism activities.

Since the direct-to-consumer sales information in the 2017 Agricultural Census does not distinguish between on-farm and off-farm sales, we likely offset some of our previously stated undercount of farms engaging in direct sales. Surveys completed for this study along with the 2021 survey by Stewart et al.<sup>21</sup> indicated that most of the direct-to-consumer sales derive from on-farm sales. While direct-to-consumer sales, both on-farm and off-farm direct sales, capture more of the food dollar by allowing the farmer to sell at or closer to the retail price, our best data source to validate this came from direct-to-consumer sales in the 2017 Agricultural Census. Even if this includes some off-farm direct sales, we believe those sales are consistent with capturing more of the food dollar. We did not include any sales in direct-to-retail markets and to institutions or food hubs, which predominate off-farm sales aside from wholesale or processor marketing channels.



Agritourism sales often substitute local production for imports typically sold by food stores, thereby preventing leakage of dollars to outside the region. However, agritourism may displace some labor (in food stores, for example) by shifting sales activity to farms. The displacement effect is likely small. Due to limitations with IMPLAN and available data, our estimates do not account for any displacement effects due to agritourism. We have also not accounted for government or other organizations' spending to support agritourism. That spending could have a positive or negative impact on local economic activity, depending on whether the value of dollars spent on agritourism outweighs the value gained by spending for alternative purposes.

Survey respondents estimated the total number of annual agritourism visitors they received. These annual visitation counts were categorized as visitors who are local, from more than 50 miles away on a day visit, and from more than 50 miles away on an overnight visit. The annual number of visitors in our survey responses ranged from six to 250,000. The median number of visitors was 800. To extrapolate the survey responses to all farms selling directly to consumers, we removed four responses from farms reporting 100,000 or more visitors because they would have substantially increased the average number that was applied to all farms selling directly to consumers. Using the median instead of an adjusted mean would likely undercount the number of visitors, so we used an adjusted mean for farms selling food directly to consumers, which was 3,709 visitors per year. For the other categories of sales, we gathered data from the surveys, producer associations and OSU Extension specialists to estimate the average number of visits.

In estimating the impacts of agritourism, we had to make assumptions about site visit attribution, or the extent to which consumers visited an area because they wanted to purchase an agritourism product or service. While agritourism may be the primary purpose of some trips, if someone stops at an agritourism farm on their way to visit family, for example, then agritourism is incidental to the trip, not its primary purpose. Similarly, sporting events and other local attractions can be a primary reason for a trip that involves some agritourism activity along the way. We based our agritourism visit attribution estimates on a study for the Hatfield Marine Science Center on the Oregon Coast.<sup>22</sup> We assumed 40% attribution for day visitors and 20% attribution for overnight visitors not staying at farms. For overnight visitors staying at farms, we used a 100% attribution value.

Our economic impact analysis is based on the 4,033 farms we estimate to be participating in agritourism-related direct sales to consumers. As mentioned, we did not include a separate category for farms selling value-added food in this number of farms estimate, and we did not have a way to determine the number of farms selling only

off-farm. We included the value-added (such as jams) sales dollars because they are in addition to the unprocessed food (such as berries) dollars. There are 18,679 farms in the Willamette Valley.

Using the full set of input data, we constructed agritourism sales, and income and employment profiles for our study area. These profiles formed the basis for the following two categories of agritourism economic effects that we estimated:

1. Impacts on agritourism farm operation and revenue, including how agritourism revenue is re-spent within the local economy.
2. Impacts on local and regional business revenue, including how revenue is re-spent within the regional economy, by attracting visitors from more than 50 miles away to the community for day and overnight visits.

To generate our farm sales and visitor impacts, we used IMPLAN's detailed model with 546 business sectors, when we understood how many sales to apply to each detailed sector. For example, in crop production, we estimated the sales at 40% vegetables and melons, 40% fruit, 10% tree nuts and 10% other crops. When we were unable to estimate the percentage of sales for each detailed sector, we used a coarser three-digit North American Industrial Classification System (NAICS) aggregation of 88 sectors. One example of using the three-digit model can be found in visitor impact estimates for meat and egg sales direct to consumers and prepared food. As noted above, conducting on-farm consumer surveys in the future would be very valuable to make these estimates, allowing the detailed model to be used for all the impacts.

All estimates are presented in inflation-adjusted 2023 dollars. The sidebar contains a glossary of key terms used in our presentation of results. Our estimates can be easily adjusted because the IMPLAN model is linear and scalable. For example, if you believe that we have overestimated by 100%, divide by two, or if you believe we have underestimated by 50%, multiply by two.

## Economic footprint of agritourism

### Agritourism industry

This section presents the direct effects of agritourism sales, which measure how they supplement total farm sales. By running the agritourism direct sales through the IMPLAN input-output model, we estimated agritourism's backward linkages in the supply chain through

### KEY TERMS

**Full- and part-time jobs:** The estimate of total employment by industry in IMPLAN is equivalent to the annual average of monthly jobs in that industry. This is the same definition used by other national databases. Estimates of employment should be interpreted as counting either full-time or part-time jobs as a whole job.

**Output:** The market value of all goods and services including other operating income and inventory.

**Value-added portion of sales:** This is the total output of an industry, minus the cost of intermediate inputs that are purchased from other industries.

**Direct effects:** The size of the initial sale or outputs of each category of agritourism or the community businesses to visitors going to the agritourism farms.

**Indirect effects:** The inter-industry or supplier effects. This is the value of output that comes from other sectors within the region to support the production of the direct effects.

**Induced effects:** These are household expenditures made by agritourism operators and employees, expenditures by supplier owners and employees and all their linked businesses to agritourism farming operations, and expenditures by owners and employees of agritourism or local businesses who sell to visitors of agritourism farms.

**Total effects:** These values include the direct effect, indirect effect and induced effects.

**Multipliers:** This report uses multipliers calculated by dividing the total effect by the direct effect. A multiplier measures the strength of the linkages of agritourism within a local economy. If the multiplier is 2.0, then for every dollar spent in agritourism, another dollar is spent in the local economy when all related effects are combined.

various layers of re-spending. We referred to impacts involving the re-spending of agritourism-related farm income as indirect effects. We then estimated how agritourism operators, their employees and their suppliers' owners and employees spent their income from agritourism-related production. These are the induced effects of agritourism. In addition to the three types of effects concerning agritourism, we measured broader impacts on tourism within the Willamette Valley economy that are brought about by agritourism farms in the region. These broader community impacts resulting from agritourism are likewise decomposed into direct, indirect and induced effects.

Local consumers and visitors generate economic activity through agritourism-related spending and re-spending. However, spending by local consumers may occur with or without agritourism. If local consumer spending occurred without agritourism and agritourism sales declined, this would cause a short-term change to the economy but little long-term change. Spending by visitors, which we defined as those coming from more than 50 miles away, can provide a net gain to the economy that would not have occurred without agritourism. If that visitor spending disappeared, we would expect the economy to contract proportionately. The difference between short- and long-term changes is based on economic base theory, which stresses that the economic growth of an economy is dependent on exporting goods and services. This is why businesses and communities strive to increase their sale of exports. Sales to visitors from more than 50 miles away can be considered an export. However, import substitution blurs these distinctions. To a large degree, agritourism spurs local consumers to purchase food

that is produced locally, rather than imported food, which prevents leakages from the local economy and avoids long-term economic contraction.

Table 7 provides a snapshot of the agritourism industry using data from 2017 to 2021 and adjusted to 2023 dollars. Agritourism is grouped into five categories that show the number of farms/producers and the number of visitors to the different types of farms. We consulted local stakeholders to inform the Christmas tree farm and nursery estimates. Overall, agritourism sites experience roughly 13.7 million visits per year. Local consumers within 50 miles of the farm site represent two-thirds of these visits. The remaining visitors comprise day visitors (19%) and overnight visitors (15%) from more than 50 miles away.

One of the frequent reasons producers stated in our survey for doing agritourism was their desire to educate people about farming. For context, we estimate that there are roughly 13.7 million agritourism trips per year, including repeat visitors. Another prominent way that many people who live in urban areas learn about farming is through county and state fairs. In 2022, 346,000 people attended the Oregon State Fair, including repeat attendees.<sup>23</sup>

As shown in Table 7, an overwhelming majority of agritourism is attributable to direct sales of farm goods to consumers, as this accounts for over 90% of both total visitors and agritourism farms. Unsurprisingly, most lodging and farm dinners come from overnight visitors outside the region. For the other categories, local consumers are responsible for the majority of visits, particularly for Christmas tree purchases. The highest relative share of day visitors falls in the direct nursery sales category.





**Table 7. Willamette Valley agritourism farms – number and visitors**

	Number of Farms	Average Number of Visitors	Total Visits Per Year Using Adj. Mean	Local Visits Per Year		Day Visitors Per Year From More Than 50 Miles Away		Overnight Visitors Per Year From More Than 50 Miles Away	
				Number	Percentage	Number	Percentage	Number	Percentage
Farms selling food direct to consumers	3,411	3,709	12,651,399 2,728,800 (if median had been used)	8,476,437	67%	2,277,252	18%	1,897,710	15%
Nurseries selling direct to consumers	229	3,750	858,750	541,013	63%	231,863	27%	85,875	10%
Christmas tree farms selling direct to consumers	120	600	72,000	61,200	85%	7,200	10%	3,600	5%
Farms providing private events and festivals	20	1,500	30,000	21,300	71%	5,100	17%	3,600	12%
Farms providing lodging and/or farm dinners	253	161	40,733	8,147	20%	10,183	25%	22,403	55%
Total Willamette agritourism farms	4,033		13,652,882	9,108,096	66%	2,531,598	19%	2,013,188	15%
Total farms in Willamette Valley	18,679								
Percentage of agritourism farms of total Willamette Valley farms	22%								

## Economic effects of agritourism sales

Table 8 shows those direct effects by type of product or service and primary source of data for the various types of agritourism farms. In total, the direct effects of agritourism amount to annual sales of roughly \$353 million. Approximately half of the direct impacts come from nursery direct sales. Direct-to-consumer value-added products and food products also account for significant shares of total sales, at 25% and 15%, respectively.

To explore a more complete picture of Oregon agritourism and not skew overall results, we excluded wine sold at vineyards directly to consumers from Table 8. A report published in 2021, which has some useful regional and marketing channel proportions, estimated vineyard sales of wine at 47% or \$74,025,550 of the study area's total processed or value-added.<sup>24</sup> We used \$82,688,450 for nonwine value-added sales. We adjusted that amount to 2023 dollars, or \$87,088,081, as shown in Table 8.

**Table 8. Agritourism sales**

Product or service including primary source of data	Direct sales – 2023 dollars
Direct to consumer sales (dct) food products — 2017 census of agriculture	\$54,632,979
Value-added food products — 2017 census of agriculture with wine removed	\$87,088,081
DTC Christmas trees — judgment	\$3,677,032
DTC nursery — surveys	\$176,924,443
Recreation and tours — 2017 census of agriculture	\$6,495,347
Farms providing only private events and festivals with over 100K events removed — surveys	\$1,837,500
Farms with only on-farm lodging and/or farm dinners — surveys	\$22,166,697
Total	\$352,822,079

Table 9 provides a summary of the cascading economic effects of the \$353 million in agritourism-related sales. Total Willamette Valley Farms was calculated by using IMPLAN's estimate of crop and animal production for 2021 adjusted to 2023 dollars, which is \$3,259,518,663. We ran those sales through the model and added together all the direct, indirect and induced effects for each category: Sales, Value-added and Employment. In addition to the sales effects, we showed the value-added effects of agritourism, which are essentially the gross domestic product of agritourism and those "driven" by agritourism through the indirect and induced effects.

As a reminder, job estimates from IMPLAN included total full- and part-time jobs. Also based on our judgment and 105 survey responses, which averaged eight extra employees being hired by agritourism farmers for agritourism activities, we increased IMPLAN's job estimates by 16 jobs at \$8,750 per job per million dollars of sales for direct-to-consumer sales of unprocessed and value-added food; 16 jobs at \$4,375 per job per million dollars of sales for Christmas tree and event sales; and 8 jobs at \$8,750 per job per million dollars of sales for greenhouse, recreation and on-farm lodging sales. To run the impacts of these additional part-time jobs, we used IMPLAN's \$30,000 – 40,000 income range and Bureau of Labor Statistics estimates of annual farmworker salary.<sup>25</sup> IMPLAN's estimates are for all marketing channels ranging from wholesale to agritourism, with agritourism being more labor-intensive than all marketing channels combined.

Sale prices of agritourism products and services or their direct effects include not only the effects directly attributable to the agritourism producer but also include the inputs that the producer purchases from suppliers, such as fuel, fertilizer, etc. The local purchases of these inputs are included in the indirect effects as well. Sales dollars always include some "double counting," and if all sales in an economy were added together, they would represent a much larger productive capacity than exists. We included sales dollars or direct effects to remain consistent with other analyses and others' descriptive estimates of economic activity.

Value-added removes those outside inputs and tabulates the additional value created only by the agritourism producer, which is primarily provided by the farmers' labor, soil, equipment and facilities, and only the production of businesses in the indirect and induced effects that are related to agritourism.

The multipliers indicate that for every agritourism dollar from sales more than another dollar is generated from suppliers of products and services to the farmer and employees. The employment multiplier suggests that for every job in agritourism, another 0.29 jobs are necessary to support the farmworkers.

**Table 9. Economic effects of agritourism production**

Type of effect	Sales	Value-added	Employment
Direct	\$352,822,078	\$202,651,008	6,984
Indirect	\$133,179,500	\$72,363,691	789
Induced	\$227,058,117	\$136,235,103	1,243
Total Willamette Valley agritourism farms	\$713,059,695	\$411,249,802	9,016
Multiplier	2.02	2.03	1.29
Total Willamette Valley farms	\$5,976,579,887	\$3,062,941,282	48,701
Percentage agritourism farms	12%	13%	19%

### Economic impacts of agritourism: consumers from more than 50 miles away (day visitors)

About one-third of agritourism's customers come from more than 50 miles away, both for the day and overnight (Table 7). These customers could have come from outside or within the study area. The surveys asked the farmers to estimate the percentage of their customers who were not local as defined by coming from more than 50 miles away. Measuring nonlocal agritourism impacts can help align visitors' reasons for traveling to the region with their interest in purchasing agritourism products or services. While we did not collect information for our study area that attributed agritourism to visitors' reasons for traveling, the previous study cited above in Newport, Oregon, for the Hatfield Marine Science Center asked visitors if their reasons for traveling were related to visiting the center. Most of the day visitors had planned several stops and attributed 40% of their reason for traveling to the place we studied. In those surveys, we also asked visitors about their expenditures during those visits. Table 10 shows the primary businesses from which we estimated agritourism visitors will purchase and the amount of sales attributed to their visits at agritourism farms based on that previous study.

In the surveys, producers estimated their visitors' origins based on whether visitors were local or traveled more than 50 miles to the farm. This means that the visitors could be from within the study area, other parts of Oregon or outside Oregon. Even if visitors from inside the study area originated more than 50 miles away from the farm, they



likely made tourism types of expenditures, which distinguished them from local visitors who typically traveled from home to farm, made other local stops, and then returned home. By multiplying the product/service-specific per-person expenditures, day visitation counts, and attribution level (40%), we computed direct sales to day visitors as shown in Table 10, which was then fed into the IMPLAN model to generate the estimated economic impacts from day visitors (Table 11).

**Table 10. Day visitor expenditures**

Product or service	Expenditures per person — 2023 dollars	Direct sales — 2023 dollars
Prepared meals	28	\$28,353,898
Food stores	8	\$8,101,114
Gas	6	\$6,075,835
Entertainment	8	\$8,101,114
Retail all types	6	\$6,075,835
Total	56	\$56,707,795

**Table 11. Economic impacts of agritourism day visitors**

Type of effect	Sales	Value-added	Employment
Direct	\$56,707,796	33,216,250	588
Indirect	\$24,561,566	14,527,562	113
Induced	\$26,367,793	15,622,245	148
Total Willamette Valley agritourism farms	\$107,637,155	63,366,057	849

### Economic impacts of agritourism: consumers from more than 50 miles away (overnight visitors)

Overnight visitors have an even greater economic impact per person, per visit than day visitors. This is because they stay longer and may purchase overnight accommodations. The expenditures per person, per visit in Table 12 are based on estimates from Dean Runyan Associates, a report from a consulting firm focused on travel and recreation, which was the most currently available data as we made our estimates using IMPLAN.<sup>26</sup> We used an attribution level of 20% for overnight visitors because overnight visits are made primarily for agritourism and are less likely to occur than day visits. The 20% is based to a large degree on the HMSC study and our judgment. If that level seems



low or high, the attribution level can be easily adjusted as mentioned above. Using a process similar to what was used to measure the day visitation impacts, the economic impacts of overnight visitors are shown in Table 13.

**Table 12. Overnight visitor expenditures**

Product or service	Expenditures per person — 2023 dollars	Direct sales — 2023 dollars
Accommodations	43	\$17,313,417
Prepared meals	61	\$24,560,894
Food stores	22	\$8,858,027
Gas	30	\$12,079,128
Entertainment	33	\$13,287,041
Retail all types	28	\$11,273,853
<b>Total</b>	<b>217</b>	<b>\$87,372,360</b>

**Table 13. Economic impacts of agritourism overnight visitors**

Type of effect	Sales	Value-added	Employment
Direct	\$87,372,360	\$52,303,899	873
Indirect	\$36,847,048	\$21,704,478	175
Induced	\$40,601,199	\$24,055,195	228
Total Willamette Valley agritourism farms	\$164,820,607	\$98,063,572	1,276

## Comparing agritourism and other marketing channel farm sales

We used the 2017 Agricultural Census data to determine most of the direct effects/sales (which are only to the producer). If those direct effects in the top row of Table 9, which are \$352,822,078, are divided by the total number of agritourism farms or 4,033, the average sales per farm related to agritourism is \$87,484. On average, respondents in the surveys we conducted and discussed above, said they earn half of their gross revenues from agritourism. Doubling the agritourism sales estimates an agritourism farm’s average total sales to be \$174,968. The agritourism employment is higher, yet the remaining portion of the agritourism farms’ employment remains at the level when other marketing channels are used, which is lower. For the agritourism half of the farm’s operations, employment is 3.51, and for the remaining portion, it is roughly 1.8 for a total of 5.31 full- or part-time jobs.

To compare farms with and without agritourism, we created a weighted average of total sales per farm from the 2017 Agricultural Census for the nine counties. Those numbers included the agritourism farms. However, half of the agritourism farms’ sales are not directly related to agritourism and agritourism farms represent only 22% of the total farms. So, the sales per farm for all farms in the Willamette Valley came directly from the 2017 Agricultural Census, which we adjusted by 10.6% using the IMPLAN inflation factor for crops to get from 2017 to 2023 dollars. The jobs estimate came from IMPLAN. Average per farm sales for all the Willamette Valley farms is \$102,152 and average per farm employment is 3.6 full- or part-time jobs.

Using these rough calculations, agritourism farms have 70% higher sales and 48% higher employment than the average of all farms. These differences are likely to be driven by agritourism farms capturing a portion of the wholesale, processing (for the portion of agritourism farms that add value), and retail portion of the food dollar, which is approximately 35% or more than three times the farmgate price. Another consideration for these differences is that many of the small to mid-sized farms are not able to produce quantities that brokers or wholesalers will purchase for sale to processors or retailers. In those cases, agritourism becomes a critically important option.

---

## Maintaining good relationships between agritourism farms and other rural landowners

While agritourism can provide many benefits to farmers and their communities, it can introduce more traffic, noise and other effects of increased economic activity. People have different views of what activities are appropriate for farm country. This has led to inconsistent policies, inequities and confusion as to what is allowable and acceptable for agritourism.



Oregon wineries have specific statutes that allow them to offer more on-farm activities than other types of farms. Both small and large wineries are allowed tours and tastings, luncheons and dinners, open houses, fee-based outdoor concerts, facility rentals, celebratory gatherings and charitable activities. As of 2019, on-farm cideries and breweries are treated similarly to wineries under Oregon law.

Most of these agritourism activities are prohibited on other types of farms or require a conditional use permit for different activities. It is not clear why this inequity among types of farms persists. Yet, recently when a bill (SB1087)

was introduced in the 2023 Legislature to allow a pilot program for farm cafes in Lane County, the divergence of views of appropriate agritourism activities was apparent in the Senate Committee on Rules hearing on the bill.<sup>27</sup> Opposition to the bill included themes of individuals wanting to retain valuable land use laws, to rank prepared food sales as subordinate to farm crops, to minimize the building and infrastructure on farmland that is not directly related to traditional farming, and to impact neighbors and other farming operations. Those in favor of the bill cited reasons, such as agritourism's ability to help offset the rising input costs of farming, to help diversify revenue sources, and to help farmers make a living wage while trying to preserve the greater land use goal of preserving farmland.

Developing more consistent policies, which will require mediating the concerns of those in support and opposing further development of agritourism, will determine whether the economic footprint and impacts estimated above can be increased — and maybe even maintained. It can help to examine the experiences of destination tourism communities and urban areas with mitigating conflicts, such as the effects of increased congestion or neighbors whose land uses differ significantly. A collaborative effort is necessary to better understand what the agritourism activities are in the Willamette Valley and Oregon and engage a wide range of stakeholders, both rural and urban, to develop the necessary compromises.

Agritourism can be important to the survival of farmers who want to diversify and keep their land in farming.<sup>28</sup> However, neighbors should not be expected to pay a high price, in terms of quality of life, so that agritourism farms can survive.

---

## Summary

This analysis indicates the potential value that agritourism may provide to the agritourism farmer and the communities of the Willamette Valley. Through the surveys we conducted, respondents overwhelmingly indicated agritourism was important to their financial viability and to their efforts to help people understand and appreciate the importance of farming.

An informal inventory estimated that approximately 22% of farms in the Willamette Valley produce one or more types of agritourism products and services. A market study gauging consumer demand would be needed to recommend opportunities for more farms to expand into agritourism or for existing farms to expand their agritourism products or services.



Based on our surveys, agritourism farmers may earn 50% of their gross revenues and 50% of their net revenues/profits from their agritourism production. With income derived from agritourism sales and other marketing channels, producers can diversify their income sources and risk as a protection against economic fluctuations.

When the agritourism farm production and the expenditures made by farm visitors are combined, the economic effects exceed \$985 million in sales, \$572 million in value-added/GDP, and 11,000 jobs. Although these effects are not a major portion of Oregon's economy, they contribute significantly to the Willamette Valley economy and the economies of local communities.

Efforts beyond the farms involved would be needed to increase the economic contribution of agritourism, which can potentially enhance opportunities for people to better understand farming and rural lifestyles. Adding financial resilience to agritourism may help retain land in farming operations.



---

## Appendix: An example of how agritourism may be expanded

Other states offer agritourism products and services that may not be allowed in Oregon. Often, the regulations in Oregon are so confusing and inconsistently applied among and within counties that many farmers are hesitant to consider adding agritourism products or services to their operations.

Oregon Revised Statutes define and provide guidance and some flexibility for agritourism activities: “What is consistent no matter where you are is that agritourism and other commercial events must be related to and supportive of agriculture. All the activities approved by these provisions must be ‘incidental and subordinate to existing farm use.’”<sup>29</sup>

Based on farmer interviews, one example of those agritourism activities is offering on-farm lodging. Often on-farm lodging does not just include lodging. It may include educational activities, such as farm tours, opportunities to interact with the livestock, and even in some cases help with livestock or crop management tasks. Some farms are currently offering on-farm lodging through online platforms like Vrbo or Airbnb. Those types of on-farm lodging are less likely to include additional experiential learning activities or support the price level of formal on-farm lodging.

If the policies for on-farm lodging, both at the state and county levels, were legalized and standardized to allow a season of up to 100 rented days per year for a small number of rental units or even just one unit, a number of current agritourism farms would likely add on-farm lodging to their offerings. Farms not active in agritourism may find on-farm lodging a good way to diversify into agritourism. The season would extend beyond 100 days because it would include a day between rented days for cleaning.

Again, the on-farm lodging must be supportive of agriculture, and incidental and subordinate to the existing farm use. The on-farm lodging option cannot be used as a method to site large lodges or essentially motels on EFU land.

The average price per night of on-farm lodging is approximately \$250. Using just one unit as an example, a season could create an additional \$25,000 (100 nights x \$250) in revenue for the farm. Using IMPLAN’s Other Accommodations sector in the detailed IMPLAN model, two-thirds of the \$25,000 — or \$16,500 — would go to the farmer and employees. Since the farmer often takes care of the on-farm lodging unit(s), we do not have a good way to allocate that \$16,500 between the farmer and employees. 24%, or \$6,000, would go to supplies or intermediate inputs. From our surveys, we would expect a major portion of that \$6,000 would be spent locally. The remaining 10% would go to lodging taxes and other property income not directly related to the on-farm lodging.

Using the average sales per agritourism farm of \$174,968 from above, a single on-farm lodging unit can increase total sales for the average agritourism farm by 14%. For agritourism farms selling other products and services, guests staying will likely purchase some of those products and services, thereby boosting sales. In addition, we would expect that many of the on-farm lodging guests would come from more than 50 miles away and generate additional economic impacts to the farm and communities similar to those noted above for overnight visitors.

Allowing agritourism farm owners to rent one or a small number of units would limit the number of people staying at the farm and minimize disruption to neighbors.



---

## Notes

- <sup>1</sup> Van Sandt, Anders, Sarah A. Low, and Dawn Thilmany. 2018. "Exploring Regional Patterns of Agritourism in the U.S.: What's Driving Clusters of Enterprises?" Cambridge University Press 47 (3): 592-609. <https://doi.org/10.1017/age.2017.36>
- <sup>2</sup> Chase, Lisa C., Mary Stewart, Brian Schillig, Becky Smith and Michele Walk. 2018. "Agritourism: Toward a Conceptual Framework for Industry Analysis." Journal of Agricultural Food Systems, and Commodity Development. <https://www.foodsystemsjournal.org/index.php/fsj/article/view/572>
- <sup>3</sup> Economic Forensics and Analytics, Inc. 2021. "The Economic Impact of the Wine and Wine Grape Industries on the Oregon Economy 2019 and 2020 Estimated." (January), 1-31. <https://industry.oregonwine.org/wp-content/uploads/sites/2/OR-Econ-Impact-2019-2020-FINAL.pdf>
- <sup>4</sup> Ross, Rachel. 2017. "Who Invented the Refrigerator." LiveScience. <https://www.livescience.com/57797-refrigerator-history.html>
- <sup>5</sup> Stewart, M., A. Comerford, B. Sorte, S. Angima, L. Chase, W. Wang, R. Bartlett, D. Conner, C. Hollas, C. Brittain, L. Quella., 2021. "Increasing Farm Viability Through Agritourism and On-Farm Direct Sales: An Oregon Producer Survey." OSU Extension Service.
- <sup>6</sup> Giri, Anil K., Dipak Subedi, Jessica E. Todd, Carrie Litkowski, and Christine Whitt. "Off-Farm Income a Major Component of Total Income for Most Farm Households in 2019." Amber Waves, 2021. <https://www.ers.usda.gov/amber-waves/2021/september/off-farm-income-a-major-component-of-total-income-for-most-farm-households-in-2019/>
- <sup>7</sup> Scale economies refer to the idea that the cost per unit of production declines as the size (or scale) of the farm increases. For example, consider a row-crop farm operation. As the acreage of the farm increases, some costs, such as the fixed cost of machinery loan payments, become smaller on a per-acre basis.
- <sup>8</sup> MacDonald, James M, Robert A. Hoppe, and Doris Newton. "Three Decades of Consolidation in U.S. Agriculture." U.S. Department of Agriculture, Economic Research Service, 2018.
- <sup>9</sup> MacDonald, James M. "Tracking the Consolidation of U.S. Agriculture." Applied Economic Perspectives and Policy 42, no. 3 (2020): 361-79. <https://doi.org/10.1002/aep.13056>.
- <sup>10</sup> Lacy, Katherine, Peter F. Orazem, and Skyler Schneekloth. "Measuring the American Farm Size Distribution." American Journal of Agricultural Economics 105, No. 1 ( 2023): 219-42. <https://doi.org/10.1111/ajae.12318>.
- <sup>11</sup> Drawing direct historical comparisons with total farm/farmland is problematic because of statistical changes to the Census of Agriculture methodology over time. This is particularly true for smaller farms, hence our focus on changes in acreage for farms of at least 100 acres. See MacDonald (2020) for more information on the issues with comparisons of the Census data over long periods.
- <sup>12</sup> Khanal, Aditya R. and Ashok K. Mishra. 2014. "Agritourism and off-farm work: survival strategies for small farms." Agricultural Economics, 45: 65-76.
- <sup>13</sup> Bigelow, Daniel. "Oregon Develops Far Less Forest and Agricultural Land than Its Neighbors." OSU Applied Economics Outreach Blog (blog), 2023. <https://blogs.oregonstate.edu/appliedeconomics/2023/06/01/oregon-develops-far-less-forest-and-agricultural-land-than-its-neighbors/>.
- <sup>14</sup> Abbott, Carl. "Senate Bill 100." Oregon Encyclopedia, 2022. [https://www.oregonencyclopedia.org/articles/senate\\_bill\\_100/](https://www.oregonencyclopedia.org/articles/senate_bill_100/)
- <sup>15</sup> 1000 Friends of Oregon. 2020. "Death By 1000 Cuts: A 10-Point Plan to Protect Oregon's Farmland." (June), 1-48. [https://friends.org/sites/default/files/2020-06/Death%20By%201000%20Cuts\\_2020.pdf](https://friends.org/sites/default/files/2020-06/Death%20By%201000%20Cuts_2020.pdf).
- <sup>16</sup> 2017 Census of Agriculture, Introduction VII.
- <sup>17</sup> 1974 Census of Agriculture - Oregon; State and County Data p. A-8.
- <sup>18</sup> 1978 Census of Agriculture - Oregon: State and County Data, p. D-4.
- <sup>19</sup> 2007 Census of Agriculture - Oregon; State and County Data, p. B-43.
- <sup>20</sup> Crompton, John. "Uses and Abuses of IMPLAN in Economic Impact Studies of Tourism Events and Facilities in the United States: A Perspective Article." Tourism Review 75, no. 1 (2020): 187-90. <https://doi.org/10.1108/TR-05-2019-0159>.
- <sup>21</sup> Stewart, M., A. Comerford, B. Sorte, S. Angima, L. Chase, W. Wang, R. Bartlett, D. Conner, C. Hollas, C. Brittain, L. Quella., 2021. "Increasing Farm Viability Through Agritourism and On-Farm Direct Sales: An Oregon Producer Survey." OSU Extension Service.
- <sup>22</sup> Sorte, Bruce 2018. Economic Linkages and Impact Analysis for the Oregon Sea Grant-Operated Visitor Center at the Hatfield Marine Science Center. Oregon Sea Grant, 1600 SW Western Blvd., Suite 350, Corvallis, OR 97333. Phone: 541-737-2714. [seagrant.oregonstate.edu/](http://seagrant.oregonstate.edu/)
- <sup>23</sup> Oregon State Fair attendance and revenues rebound from the pandemic. Oct. 31, 2022. Oregon Public Broadcasting. <https://www.opb.org/article/2022/10/31/oregon-state-fair-attendance-and-revenues-rebound-from-pandemic/>.
- <sup>24</sup> Economic Forensics and Analytics, Inc. 2021. "The Economic Impact of the Wine and Wine Grape Industries on the Oregon Economy 2019 and 2020 Estimated." (January), 1-31. <https://industry.oregonwine.org/wp-content/uploads/sites/2/OR-Econ-Impact-2019-2020-FINAL.pdf>
- <sup>25</sup> Bureau of Labor Statistics, U.S. Department of Labor, Occupational Outlook Handbook, Agricultural Workers, at <https://www.bls.gov/ooh/farming-fishing-and-forestry/agricultural-workers.htm> (visited October 03, 2023).
- <sup>26</sup> "The Economic Impact of Travel in Oregon 2021p (Preliminary) Travel Oregon."5/6/2022 PRIMARY RESEARCH CONDUCTED BY Dean Runyan Associates 811 SW 11th Avenue Suite 920 Portland, Oregon 97205.
- <sup>27</sup> <https://olis.oregonlegislature.gov/liz/2023r1/Measures/Testimony/sb1087>
- <sup>28</sup> Van Sandt, Anders, Sarah A. Low, and Dawn Thilmany. 2018. "Exploring Regional Patterns of Agritourism in the U.S.: What's Driving Clusters of Enterprises?" Cambridge University Press 47 (3): 592-609. <https://doi.org/10.1017/age.2017.36>.
- <sup>29</sup> Oregon Law: Agritourism, Commercial Events or Activities, [https://smallfarms.oregonstate.edu/sites/agscid7/files/smallfarms/factsheet5\\_agritourismenteventsactivities.pdf](https://smallfarms.oregonstate.edu/sites/agscid7/files/smallfarms/factsheet5_agritourismenteventsactivities.pdf)

© 2024 Oregon State University. Extension work is a cooperative program of Oregon State University, the U.S. Department of Agriculture, and Oregon counties. Oregon State University Extension Service offers educational programs, activities, and materials without discrimination on the basis of race, color, national origin, religion, sex, gender identity (including gender expression), sexual orientation, disability, age, marital status, familial/parental status, income derived from a public assistance program, political beliefs, genetic information, veteran's status, reprisal or retaliation for prior civil rights activity. (Not all prohibited bases apply to all programs.) This publication will be made available in an accessible alternative format upon request. Please contact [puborders@oregonstate.edu](mailto:puborders@oregonstate.edu) or 1-800-561-6719.

Published February 2024