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## Montana's Agritourism and Recreation Business: Ten Years Later

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## EXECUTIVE SUMMARY

The population for this survey was composed of 1,374 farmers/ranchers identified by the Montana Field Office of the National Agricultural Statistics Service as currently being involved in a tourism or recreation business or as anticipating involvement in such a business in the next five years. Of the 1,374 surveys mailed, 530 useable surveys were returned for a 39% response rate.

The following profile of farm/ranch recreation businesses was conceptualized:

- Most farmers/ranchers involved in a recreation business had been in agriculture for over 30 years.
- The majority of respondents owned and operated in excess of 3,000 acres, and many leased over 3,000 acres. In general, the respondents had large agriculture operations.
- On average, 50% of respondents' income was from livestock production. Recreation accounted for over 4% of total income on average.
- FWP block management and fee hunting/fishing are the two most frequent recreation businesses currently operated, and fee hunting/fishing and guesthouse/cabin rental are the recreation businesses most likely to be started or expanded in the next 5 years.
- The ten most popular activities among guests/users included guided hunting, unguided hunting, horseback riding, family-style meals, guided fishing, cattle drives/riding herd, horseback riding lessons, "other" activities, rafting/kayaking, and unguided fishing.
- The ten most common new activities planned to be offered within 5 years included unguided hunting, watching wildlife, unguided fishing, ranch chores, hiking/nature walks, horseback riding, family-style meals, cattle drives/riding herd, and photo safaris.
- "Additional income" was the most important reason for operating a recreation business.
- "Liability issues" was the obstacle rated as most restrictive.
- Most employment opportunities were seasonal in nature.
- On average, the majority of visitors came from the western 1/3 of the US. When broken down by type of activity, those involved primarily in FWP block management or fee hunting/fishing as a recreation business reported that the majority of their visitors came from the western 1/3 of the US, while those primarily engaged in outfitting and guiding as a recreation business reported that the majority of their visitors were from the eastern 1/3 of the US.
- Word of mouth seemed to be the most effective way in which first-time guests initially learn about these vacation opportunities.

## Table of Contents

INTRODUCTION .....	1
METHODOLOGY .....	3
Sample .....	3
Problem Statements .....	3
RESULTS .....	4
Farm/Ranch Agricultural Demographic Information .....	4
Farm/Ranch Recreation Business Data .....	7
Farm/Ranch Recreation Business Marketing Information .....	15
DISCUSSION .....	20
Reasons for Operating Recreation Businesses .....	20
Obstacles to Recreation Business Operation .....	21
Popularity of Activities and New Activities Planned .....	22
Visitor Origin.....	23
Guests' Method of Learning.....	23
SUMMARY .....	25
Appendix A.....	26
MONTANA FARM & RANCH RECREATION BUSINESS ASSESSMENT .....	32

## List of Tables and Figures

Table 1: Farm/Ranch Recreation Business Types (National Agricultural Statistics Service Survey)* .....	2
Table 2: Number of Years in Agriculture 2007/1997 Comparison.....	5
Table 3: Operation Acreage, 1997/2007 Comparison.....	6
Table 4: Income Percentage Allocations by Enterprise, 1997 and 2007 .....	6
Table 5: Distribution of Percentage Allocations of Income, 2007.....	7
Table 6: Distribution of Percentage Allocations of Income, 1997.....	7
Table 7: Operate a Recreation Business .....	7
Table 8: Type of Recreation Business Operated/Planned *.....	8
Table 9: <i>Primary</i> Recreation Business if Currently Operating .....	8
Table 10: Popularity of Activities Offered .....	9
Table 11: New Activities Planned .....	10
Table 12: Likelihood of Future Changes to Farm/Ranch Land .....	11
Table 13: Reasons for Operating Recreation Businesses.....	12
Table 14: Obstacles to Recreation Business Operation .....	13
Table 15: Average Number of Employees for Farm/Ranch Recreation Businesses.....	13
Table 16: Distribution of Employees for Farm/Ranch Recreation Businesses.....	13
Table 17: Visitor Origin Reported by Primary Business Activity .....	16
Table 18: Initial Method of Learning about Farm/Ranch Recreation.....	16
Table 19: Initial Method of Learning about Farm/Ranch Recreation by Primary Business Activity.....	17
Table 20: Most Effective Method of Learning about Farm/Ranch Recreation.....	17
Table 21: Selling Agriculture Products Locally .....	18
Table 22: Barriers to Selling Products Locally .....	18
Figure 1: Number of Years in Agriculture.....	4
Figure 2: 2007 Operation Acreage.....	5
Figure 3: Origin of Farm/Ranch Vacation Guests .....	15

## INTRODUCTION

Farmers and ranchers have been taking advantage of Montana's growing tourism industry in a relationship that benefits farmers, ranchers, and tourists. In 1997, a study conducted by the Institute for Tourism and Recreation Research investigated a trend in the tourism industry where farms and ranches were partnering with recreation. The 1997 study was the first study conducted by the institute that focused exclusively on agritourism. The topic of agritourism was revisited in 2006. This report has many similarities to the document produced in 1997 but there are some fundamental differences that need to be described to readers.

For reference, many of the statistical findings from the 1997 report are included in this document. However, please note that there are significant differences in the sampling methods between the surveys. Because of these differences, the statistics, while presented side-by-side, should not be used for direct comparison. In all likelihood, there have been many changes in Montana agritourism since 1997, but because of the different sampling methods, any differences that were found should be credited, at least in part, to methodology.

The sampling method used in the 1997 survey relied on several sources for contacting ranchers and farmers who were engaged in tourism businesses. Specifically, the sample was collected using three sources: rosters from Travel Montana's farm/ranch recreation workshops, farmers and ranchers listed in Travel Montana's Vacation Planner who did not attend the workshops, and members of the Montana Ranch Vacation Association. In comparison, this report used one source. The 2007 sampling method used a list of farms and ranches in Montana that were identified by the National Agriculture Statistics Service as farms and ranches that are involved or plan to be involved in some recreation- or tourism-related business.

There are approximately 27,870 farms and ranches in Montana. In an effort to find out more about farm/ranch recreation businesses, the Institute for Tourism and Recreation Research commissioned the Montana Field Office of the National Agricultural Statistics Service (NASS) to add seven recreation business questions to their annual agricultural surveys (The Acreage and Production Survey, December Crops Survey, January Cattle Survey and the January Sheep and Goat Survey). From October 10, 2006 to January 19, 2007, data was collected through telephone interviews and mailed questionnaires. Approximately 11,000 farmers/ranchers were randomly selected to participate in the NASS study. Mail-back surveys were received by 1,700 producers and 9,300 were contacted by telephone or personal visits with an overall response rate of 64.7 percent. The following data were obtained by the NASS survey:

• Approximate number of farms/ranches in Montana	27,870
• Farmers/ranchers who sell products directly to local/state markets or consumers	9,080 (32.6%)
• Farmers/ranchers who are interested in selling products directly to local/state markets or consumers	6,694 (24.0%)
• Farms/ranches which receive income from any recreation or tourism business	2,418 (8.7%)
• Farms/ranches anticipating generating income from some form of recreation or tourism business in the next 5 years	1,751 (6.3% more)
• Anticipated number of farms/ranches operating some form of recreation business by the year 2012	4,169 (15.0% of total MT farms/ ranches)

The NASS survey also asked what types of recreation/tourism activities are currently operated for additional income and which activities farmers/ranchers anticipate undertaking in the next 5 years (see Table 1).

**Table 1: Farm/Ranch Recreation Business Types (National Agricultural Statistics Service Survey)\***

	# Operating in Montana, 2006		# to be added in 5 years		Total # anticipated by 2012	
<b>Fee hunting and fishing</b>	748	26%	856	39%	1604	31%
<b>Block Management (FWP)</b>	983	34%	392	18%	1375	27%
<b>Guiding and outfitting or renting access to guides and outfitters</b>	470	16%	209	10%	679	13%
<b>Horse rental and horseback rides</b>	99	3%	87	4%	186	4%
<b>Wagon rides and ranch barbecues</b>	44	2%	30	1%	74	1%
<b>Working ranch and farm vacations</b>	98	3%	79	4%	177	3%
<b>Bed and breakfast</b>	38	1%	103	5%	141	3%
<b>Lodging and cabin rental and camping</b>	227	8%	197	9%	424	8%
<b>Farm and ranch tours</b>	38	1%	108	5%	146	3%
<b>Other recreation or tourism</b>	176	6%	137	6%	313	6%
<b>Total</b>	2921	100%	2198	100%	5119	100%

\* Numbers reflect the full population, projected from the sample.

There is a wide variety of recreation and tourism activities on farms and ranches, ranging from Fish, Wildlife and Parks Block Management to cabin rentals to horseback rides. To further understand the farm/ranch recreation businesses, the Institute for Tourism and Recreation Research conducted an additional survey of Montana farms and ranches currently involved in tourism or recreation or thinking about starting in that field. The purpose of this investigation was to gain a clearer picture of what is currently happening on farms and ranches in terms of recreation and tourism activities, to gauge what may be happening in the near future, and to cautiously compare these findings with those of the 1997 survey to estimate how agritourism in the state may be changing.

## **METHODOLOGY**

A modified Dillman's mail back survey method was used for this study. Four rounds of mailings were sent to the survey sample. The first mailing was a letter informing recipients about the study and indicating that they would be receiving a survey. The second mailing was a copy of the survey sent to the entire survey sample and was sent one week after the first-round mailing. A reminder postcard was then sent which thanked those who had already responded to the survey and asked non-respondents to please fill out and return the survey. Finally, the fourth mailing was delivered two weeks after the postcards were sent. This final mailing was a replacement survey sent to non-respondents.

### **Sample**

The sample surveyed was identified through a previous study conducted by the National Agricultural Statistics Service Montana Field Office (NASS). The NASS study identified 1,374 farms and ranches in Montana that reported receiving income from recreation or tourism activities and those that anticipated participation in these activities in the near future. A total of 1,374 surveys were mailed.

### **Problem Statements**

The purpose of this study was to gain a better understanding of the diversity of farm and ranch recreation businesses in Montana and to build on a past farm/ranch tourism study. Several problem statements guided the scope of this investigation:

- What recreation businesses are currently operated, and what recreation businesses are being planned in the next five years?
- What activities do these farms/ranches currently offer and which are planned?
- Why do farmers/ranchers operate recreation businesses?
- What obstacles do farmers/ranchers see in terms of operating a recreation business?
- How do farmers and ranchers who participate in recreation and tourism businesses see the uses of their land changing in the near future?
- How has agritourism in Montana changed in the last 10 years?

## RESULTS

Of the 616 surveys returned, 530 useable surveys were available for this analysis. However, please note that different analyses apply to different portions of the data set so not all results are drawn from all 530 useable responses. A response rate of 39 percent was obtained when only usable surveys were counted (41.3% response rate for all returned surveys).

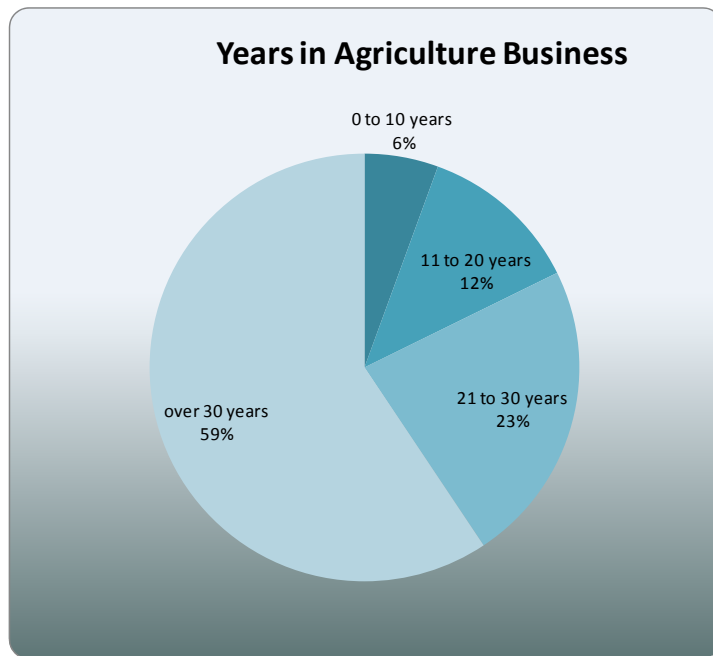
### Farm/Ranch Agricultural Demographic Information

The average number of years respondents have been in the agriculture business is 35.8 years. The average number of years the respondents' families have been involved in agriculture is 82.8 years. These averages do not include five respondents who indicated "indefinitely."

The results of this question when asked in the 1997 agritourism survey indicated that, at that time, the average number of years in agriculture was 31.5 years.

Figure 1 displays the percentage of respondents fitting into four categories of 0 to 10 years, 11 to 20 years, 21 to 30 years or over 30 years in agriculture. The percentage of respondents in each category increased as the number of years in agriculture increased. This trend culminates in 59 percent of the respondents fitting into the "over 30 years" category. The vast majority of Montana farmers and ranchers who participate in some form of tourism or recreation business on their farm or ranch (or plan to do so) have been in the agriculture business for over 20 years, according to the results of this survey.

**Figure 1: Number of Years in Agriculture**



If compared to 1997 data (Table 2), the trends in both data sets are similar; the percentage of farmers/ranchers in each of the categories increases as the number of years increases. However, the distribution across the categories changed significantly during the 10 years from 1997 to 2007. The largest change occurred in the "over 30 Years" category with an increase of 16 percent.

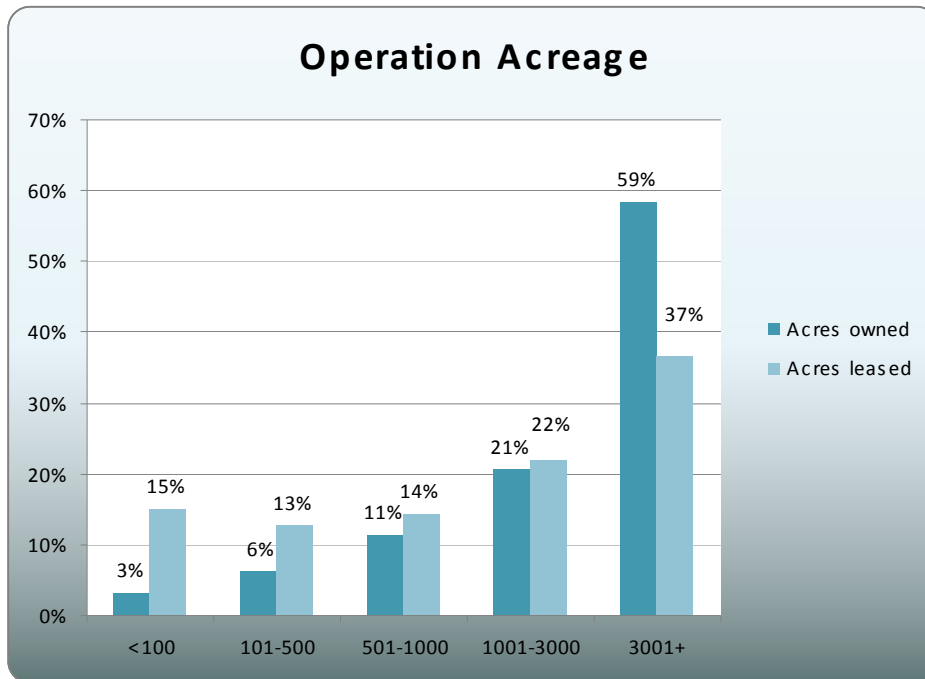
**Table 2: Number of Years in Agriculture 2007/1997 Comparison**

	0-10 years	11-20 years	21-30 years	Over 30 years
<b>2007</b>	6%	12%	23%	59%
<b>1997</b>	15%	20%	22%	43%

The data collected in 1997 concluded that Montana farms and ranches in the recreation/tourism business often operate on acreages greater than 3001 acres. This study found those descriptors to still be accurate.

The majority of respondents (59%) own and operate 3001+ acres. Also, 37 percent of the respondents lease 3001+ acres of land. Relatively few respondents own less than 500 acres, with just three percent of respondents indicating they own less than 100 acres and six percent of respondents indicating they own 101-500 acres. More respondents indicated they lease smaller acreages, however, with 14 percent leasing less than 100 acres, and 13 percent leasing 101-500 acres (see Figure 2).

**Figure 2: 2007 Operation Acreage**



There are some interesting differences between the 1997 and 2007 data (see Table 3). In 1997, fewer respondents indicated owning mid-sized operations (501-1000 acres), and larger percentages of respondents indicated that they owned smaller operations (14% owned less than 100 acres, 16% owned 101 to 500 acres). In 2007, fewer respondents indicated owning smaller acreages and more respondents indicated owning large acreages of 3001 or more acres. In 1997, fewer respondents leased land of any acreage category than did those in 2007.

**Table 3: Operation Acreage, 1997/2007 Comparison**

	1997 owned	2007 owned	1997 leased	2007 leased
>100	14%	3%	8%	15%
101-500	16%	6%	9%	13%
501-1000	7%	11%	10%	14%
1001-3000	22%	21%	13%	22%
3001+	36%	59%	26%	37%

Percentages of gross annual household income as reported by survey respondents were allocated to different agricultural enterprises. Table 4 indicates average income allocations in 2007 and 1997. Livestock production averaged the highest percentage of gross household income in both years. In 2007, crop production and off-farm/ranch income were the second and third largest percentages of income. In 1997, the three largest portions of income were livestock production, off-farm/ranch income and recreation, respectively. It is likely that methodology was influential in the number of respondents indicating recreation income in the 1997 survey since that sample was generated from recreation businesses in Travel Montana's Vacation Planner. It is possible that some of the 1997 respondents do not conduct an agriculture business and therefore would not be included in the 2007 sample.

**Table 4: Income Percentage Allocations by Enterprise, 1997 and 2007**

Enterprise	Average 2007	Average 1997
% Livestock production	51%	41%
% Crop production	18%	15%
% Off-farm/ranch income	13%	20%
% Recreation	4%	16%
% Other*	3%	4%
% Animal boarding, grazing leases	2%	2%
% Land/house leasing	1%	1%
% Extractive rights	1%	2%
% Water rights	<1%	0%

\* See Appendix A for a list of "other" income sources.

Table 5 shows the distribution of income allocations by enterprise. Each enterprise should be examined separately by column. For example, the first column of the table shows the distribution of income from livestock production for all respondents. To interpret the table, 22% of all respondents indicated no income from livestock production, 13% made 1-25% of their income from livestock production, 28% made 26-75% of their income from livestock production, and 37% made 76-99% of their income from livestock production. The information in Table 5 is based on 2007 data, and Table 6 presents the 1997 data to allow for comparison between the two years.

**Table 5: Distribution of Percentage Allocations of Income, 2007**

% Income 2007	Livestock production	Crop production	Water rights	Land/house leasing	Animal boarding, grazing leases	Extractive activities	Recreation	Off-farm/ranch income
0%	22%	49%	99%	91%	87%	90%	52%	58%
1 - 25%	13%	25%	1%	8%	10%	8%	44%	24%
26 - 50%	19%	16%	-	1%	2%	1%	2%	10%
51 - 75%	13%	4%	-	<1%	-	1%	1%	3%
76 - 99%	28%	5%	-	-	<1%	-	1%	5%
100%	6%	1%	<1%	<1%	-	-	<1%	<1%

**Table 6: Distribution of Percentage Allocations of Income, 1997**

% Income 1997	Livestock production	Crop production	Water rights	Land/house leasing	Animal boarding, grazing leases	Extractive activities	Recreation	Off-farm/ranch income
0%	25%	58%	-	88%	87%	91%	54%	57%
1 - 25%	19%	19%	-	11%	12%	8%	26%	18%
26 - 50%	19%	16%	-	1%	1%	<1%	8%	9%
51 - 75%	14%	3%	-	0%	0%	<1%	4%	4%
76 - 99%	15%	3%	-	0%	0%	0%	4%	10%
100%	7%	1%	-	0%	<1%	<1%	5%	3%

**Farm/Ranch Recreation Business Data**

Because of the sampling frame, a large majority of respondents currently operate some form of recreation business (81%), and 13 percent plan to operate in the next 5 years (see Table 7).

**Table 7: Operate a Recreation Business**

Current Status	2007 Frequency	2007 Percent
Currently operate a recreation/tourism business	427	81%
Don't currently operate but plan to	68	13%
Unknown/can't be determined	35	7%
<b>Total*</b>	<b>530</b>	<b>100%</b>

\* 2007 Percent column totals to 101% due to rounding

Among the farmers/ranchers who currently operate a recreation business, the average number of years that the farm/ranch has been in recreation business(es) is 12. (The range is from 0 to 85 years.)

Respondents identified all recreation businesses currently operated and all recreation businesses planned to start or expand in the next 5 years (Table 8). Respondents could select all that applied. Therefore, the sum of percentages exceeds 100%. The most frequently selected businesses were FWP block

management (49%), fee hunting and fishing (31%) and guesthouse/cabin rental (18%). In the next five years, more farms and ranches anticipate expanding into fee hunting and fishing (25%), guesthouse/cabin rental (20%), and FWP block management (16%).

**Table 8: Type of Recreation Business Operated/Planned \***

	Currently Operate		Expand /Start in Next 5 Years	
	Frequency	Percent	Frequency	Percent
<b>FWP Block management</b>	216	49%	74	16%
<b>Fee hunting/fishing</b>	133	31%	114	25%
<b>Guest house/cabin rental</b>	75	18%	88	20%
<b>None</b>	--	--	180	40%
<b>Outfitter guide business</b>	57	13%	29	6%
<b>Working farm/ranch vacations</b>	52	12%	45	10%
<b>Other**</b>	35	8%	17	4%
<b>Horse rental/horseback rides</b>	28	7%	20	4%
<b>Bed and breakfast</b>	24	6%	24	5%
<b>Farm/ranch tours</b>	22	5%	47	10%
<b>Cattle drives</b>	20	5%	18	4%
<b>Dude/guest ranch</b>	19	5%	16	4%
<b>Campground or RV park</b>	12	3%	16	4%
<b>Wagon rides/ranch barbeques</b>	10	2%	23	5%
<b>Rodeo</b>	6	1%	6	1%

\* Respondents could check all that applied.

\*\* See Appendix A for a list of “other” recreation businesses.

Participation in FWP block management was most often identified as the primary recreation business by farmers and ranchers (48%) who currently operate a recreation business. Others that ranked high were fee hunting and fishing (23%), outfitter/guide business (10%), and guest house/cabin rental (6%) (see Table 9).

**Table 9: Primary Recreation Business if Currently Operating**

	Frequency	Percent
<b>FWP block management</b>	156	48%
<b>Fee hunting/fishing</b>	74	23%
<b>Outfitter/guide business</b>	31	10%
<b>Guest house/cabin rental</b>	20	6%
<b>Other</b>	14	4%
<b>Working farm/ranch vacations</b>	12	4%
<b>Dude/guest ranch</b>	6	2%
<b>Bed and breakfast</b>	3	1%
<b>Farm/ranch tours</b>	3	1%
<b>Cattle drives</b>	2	1%
<b>Horse rental/horseback rides</b>	2	1%
<b>Rodeo</b>	2	1%
<b>Wagon rides/ranch barbeques</b>	1	<1%
<b>Campground/RV park</b>	1	<1%
<b>Total</b>	327	100%

Another question asked the respondents to describe how popular their activities are with guests/users. A Likert-type scale was used with 1 = not popular and 5 = very popular. The results are presented in Table 10.

Unguided hunting is offered by a large number of survey respondents (248) and received a high popularity rating (4.45). Guided hunting is offered by significantly fewer respondents (100) but received a high popularity rating as well (4.48). Examples of activities that are offered by fewer survey respondents, but still have high popularity ratings are horseback riding, family style meals, guided fishing, and cattle drives/riding herd. The activity receiving the lowest popularity rating is snowmobiling, offered by 21 respondents.

**Table 10: Popularity of Activities Offered**

	# of Respondents offering activity	Average Popularity Rating*	Most Frequent Rating
<b>Guided hunting</b>	100	4.48	5
<b>Unguided hunting</b>	248	4.45	5
<b>Horseback riding</b>	63	4.27	5
<b>Family style meals</b>	80	4.11	5
<b>Guided fishing</b>	39	4.03	5
<b>Cattle drives/herd riding</b>	47	3.89	5
<b>Horseback riding lessons</b>	34	3.82	5
<b>Other **</b>	11	3.82	4
<b>Rafting/kayaking</b>	10	3.70	5
<b>Unguided fishing</b>	98	3.67	5
<b>Children's programs</b>	32	3.66	5
<b>Watching wildlife</b>	144	3.63	3
<b>Rodeo activities</b>	17	3.47	2,4
<b>Pack-trips</b>	18	3.44	4
<b>Cross country skiing</b>	18	3.39	2,3
<b>Hiking/nature walk</b>	91	3.35	3
<b>History programs/tours</b>	41	3.32	4
<b>Camping</b>	62	3.24	3
<b>Ranch chores</b>	70	3.19	2
<b>Float trips/canoeing</b>	22	3.18	3
<b>Photo safari</b>	45	3.16	3
<b>Mountain biking</b>	21	3.00	2
<b>Snowmobiling</b>	21	2.95	2

\* Ratings: 1 = not popular to 5 = very popular

\*\* See Appendix A for a list of “other” activities.

Some respondents (381) indicated new activities which they anticipate offering in the next five years. Of the 381 respondents, 197 plan to offer at least one new activity. Since respondents could indicate more than one new activity planned, the sum of the percentages exceeded 100% (see Table 11).

**Table 11: New Activities Planned**

Activity	Frequency	Percentage*
Unguided hunting	98	26%
Watching wildlife	59	16%
Guided hunting	47	12%
Unguided fishing	42	11%
Ranch chores	42	11%
Hiking/nature walk	42	11%
Horseback riding	40	11%
Family style meals	37	10%
Cattle drives/herd riding	34	9%
Photo safari	25	7%
Cook-outs	24	6%
Camping	24	6%
History programs or tours	23	6%
Other**	23	6%
Children's programs	22	6%
Mountain biking	14	4%
Horseback riding lessons	12	3%
Guided fishing	12	3%
Rodeo activities	11	3%
Pack-trips	10	3%
Cross country skiing	9	2%
Float trips	8	2%
Snowmobiling	8	2%
Rafting/kayaking	6	2%
No new activities planned	194	51%

\* Based on 381 respondents answering this question.

\*\* See Appendix A for a list of “other” activities.

An item added to the 2007 survey related to how respondents see their land changing in the future. Respondents were asked how likely they are to do the following (see Table 12) in the next five to 10 years. Responses were based on a Likert-type scale ranging from 1 = not at all likely to 5 = very likely.

**Table 12: Likelihood of Future Changes to Farm/Ranch Land**

	1 - Not at all likely	2	3	4	5 - Very likely
<b>Place some land into conservation easements</b>	63% (n=286)	15% (n=66)	11% (n=48)	4% (n=17)	9% (n=39)
<b>Sell land to a developer if the price is right</b>	70% (n=320)	10% (n=47)	10% (n=45)	4% (n=20)	5% (n=23)
<b>Sell land for agriculture purposes</b>	65% (n=299)	14% (n=64)	10% (n=45)	5% (n=23)	6% (n=26)
<b>Sell land to environmental organization</b>	82% (n=368)	10% (n=44)	5% (n=23)	2% (n=8)	2% (n=8)
<b>Donate land to environmental organization</b>	95% (n=423)	3% (n=14)	<1% (n=2)	1% (n=4)	1% (n=4)
<b>Land transfer/family trust development of LLC</b>	45% (n=204)	12% (n=54)	14% (n=63)	12% (n=54)	17% (n=77)
<b>Lease your land for agriculture</b>	45% (n=201)	17% (n=75)	18% (n=82)	10% (n=45)	10% (n=47)

Various reasons for operating a recreation business were rated according to level of importance. A Likert-type scale was used with 1 = not at all important and 5 = most important. “Additional income” topped the list of reasons for operating a recreation business. The next three highest-ranked reasons were “to fully utilize resources,” “fluctuations in agriculture income,” and “to educate the consumer” (see Table 13). “Tax incentives” was given the least importance as a reason for operating a recreation business.

The right hand column presents the average importance ratings from the 1997 data. The three most important reasons were the same in 1997 as they were in 2007.

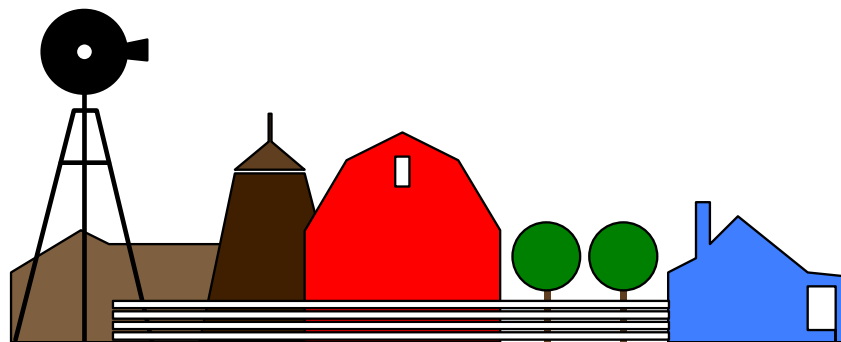
**Table 13: Reasons for Operating Recreation Businesses**

Reason	Average importance rating, 2007*	Most frequent rating, 2007	Average importance rating, 1997*
<b>Additional income</b>	4.30	5	4.41
<b>To fully utilize the resources</b>	3.64	4	3.87
<b>Fluctuations in ag income</b>	3.51	5	3.65
<b>To educate the consumer</b>	2.67	1	2.90
<b>To meet a need in recreation/ vacation market</b>	2.40	1	2.78
<b>It is an interest/hobby</b>	2.29	1	2.97
<b>Companionship with guest/users</b>	2.29	1	2.95
<b>Employment for family members</b>	2.10	1	3.00
<b>Losing government ag programs</b>	2.28	1	1.68
<b>Because of other farm ranch recreation business success</b>	2.05	1	2.45
<b>Tax incentives</b>	1.50	1	1.82

\* Ratings: 1 = not at all important to 5 = most important

Besides reasons for operating a recreation business, respondents rated how restrictive certain obstacles were in terms of operating a recreation business. A Likert-type scale was used with 1 = not restrictive to 5 = very restrictive.

Liability issues led the list as being most restrictive. Regulations and rules/legal constraints and lack of time were also rated as very restrictive. In general, obstacles to recreation business operations are very similar to what they were 10 years ago. The item seen as the biggest obstacle, liability issues, was added to this survey, and was not included in the 1997 survey (see Table 14).



**Table 14: Obstacles to Recreation Business Operation**

Obstacle	Average restrictive rating, 2007*	Most frequent rating, 2007	Average restrictive rating, 1997*
<b>Liability issues</b>	4.16	5	----
<b>Regulations &amp; rules/legal constraints</b>	3.55	5	3.85
<b>Lack of time</b>	3.54	5	3.29
<b>Lack of financial assistance/resources</b>	3.12	3	3.44
<b>Lack of recreation business knowledge</b>	2.76	3	2.78
<b>Lack of personnel</b>	2.92	1	2.81
<b>Lack of information</b>	2.64	3	2.41
<b>Lack of social networks with others in agritourism/recreation</b>	2.57	3	2.26
<b>Lack of family and/or public support</b>	2.30	1	2.29

\* Ratings: 1 = not restrictive to 5 = very restrictive

Most farmers/ranchers do not employ large numbers of workers for recreation businesses (including themselves and their family). The average number of seasonal employees is higher than the number of year-round employees, but most survey respondents employ few people, regardless of whether their employees are seasonal or year-round (see Table 15).

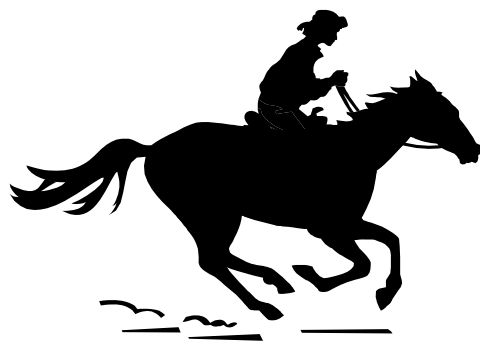
**Table 15: Average Number of Employees for Farm/Ranch Recreation Businesses**

Type of employment	Average
<b>Year-round</b>	1.46
<b>Seasonal</b>	3.08

Table 16 details the distribution of employees in farm/ranch recreation businesses. A full 43 percent of respondents indicated having no year-round employees for their recreation/tourism business. Thirty percent of respondents indicated having two seasonal employees and 27 percent indicated having two year-round employees. Few respondents indicated that their recreation business employs more than 4 people year-round.

**Table 16: Distribution of Employees for Farm/Ranch Recreation Businesses**

Number of employees	Year-round	Seasonal
<b>0</b>	43%	16%
<b>1</b>	14%	19%
<b>2</b>	27%	30%
<b>3</b>	7%	12%
<b>4</b>	5%	8%
<b>5</b>	2%	5%
<b>6 or more</b>	4%	10%
<b>Total</b>	100%	100%



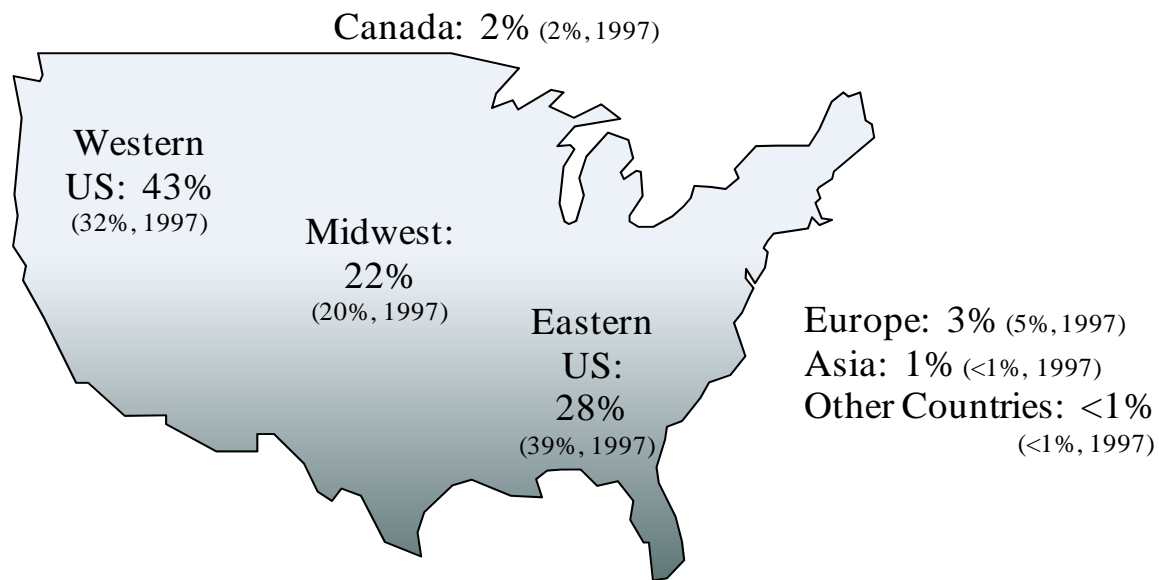
### Farm/Ranch Recreation Business Marketing Information

The average number of guests per farm/ranch each year is 106 guests (range of 0 to 2,500 paying guests). The average percent of guests/users who are repeat customers is 62.0 percent. The range was from 0 percent to 100 percent.

The largest percent of guests/users were from the western 1/3 of the United States. The survey found that just 3 percent of visitors originated in Europe. The numbers in parenthesis in Figure 3 indicate the percentages of visitor origin from the 1997 survey. There was a marked decrease in the percentage of visitors from the eastern U.S. while visitors from the western U.S. increased quite significantly. The number of visitors from other regions did not change drastically between 1997 and 2007 (see Figure 3).

The data suggest that splitting the analysis, by using the reported primary recreation business of the survey respondent to separate the visitors into groups, causes the distribution of origins to no longer match the overall pattern described in Figure 3. For instance, the visitors to farms and ranches where the primary recreation business is FWP Block Management originated primarily in the Western US (67%) followed by the Midwest (22%) and then the Eastern US (10%). Small sample sizes in many of the primary business categories limit the reliability of this result. However, several categories that have larger samples indicate that the pattern in Figure 3 differs by primary farm/ranch recreation business.

**Figure 3: Origin of Farm/Ranch Vacation Guests**



**Table 17: Visitor Origin Reported by Primary Business Activity**

Primary Rec/Tourism Business	Western	Midwest	Eastern	Sample Size
<b>Fee Hunting/ Fishing</b>	41%	27%	28%	51
<b>FWP Block Management Program</b>	67%	22%	10%	42
<b>Outfitter Guide</b>	18%	23%	53%	29
<b>Other*</b>	42%	19%	25%	44

\* contains 11 categories collapsed into “other” due to their small sample size when reported alone (contains: working farm ranch; dude/guest ranch; bed and breakfast; horse rental; wagon rides/BBQ; guest house/cabin rental; farm/ranch tours; cattle drives/riding herd; rodeo; campground/RV; other)

Farmers/ranchers identified how first-time guests initially learned about their recreation business(es). Respondents could check all options that applied. Family/friends/acquaintances of past guests (60%) led the list and was followed by family/friends/acquaintances of the farmers/ranchers (41%). This would indicate that word of mouth is very important in attracting visitors (see Table 18).

There are notable changes to “initial method of learning” when analyzed by groups of primary businesses (see Table 19). While many groups do not have high enough sample sizes to reliably report percentages, block management businesses had a large sample and differed from the statistics in Table 18. Block management businesses reported using “other” methods of initial learning. Further investigation identified the Montana Fish Wildlife and Parks hunter access guides as a major portion (66%) of the “other” responses found in Appendix A.

**Table 18: Initial Method of Learning about Farm/Ranch Recreation**

Method*	Frequency 2007	Percent 2007	Frequency 1997	Percent 1997
<b>Family, friends, acquaintances of past guests</b>	138	60%	121	78%
<b>Your family friends, acquaintances</b>	96	42%	86	56%
<b>Other**</b>	81	35%	48	31%
<b>Internet-your own website</b>	51	22%	48	31%
<b>Magazine/newspaper article</b>	30	13%	59	38%
<b>Internet--Travel MT Site</b>	28	12%	-	-
<b>Montana travel planner</b>	21	9%	73	48%
<b>Internet association</b>	20	9%	-	-
<b>Chamber of commerce or CVB</b>	19	8%	51	33%
<b>Books</b>	17	7%	48	31%
<b>Internet--travel planning website</b>	13	6%	-	-
<b>Travel agents</b>	10	4%	32	21%

\* Respondents could check all that applied.

\*\* See Appendix A for other methods of learning.

**Table 19: Initial Method of Learning about Farm/Ranch Recreation by Primary Business Activity**

Method*	Fee Hunting and fishing	FWP Block Mgmt	Outfitter Guide
Family, friends, acquaintances of past guests	62%	48%	73%
Your family friends, acquaintances	46%	31%	37%
Other*	20%	75%	26%
Internet-your own website	16%	4%	40%
Magazine/newspaper article	9%	--	23%
Internet--Travel MT Site	5%	4%	13%
Montana travel planner	7%	2%	20%
Internet association	--	2%	20%
Chamber of commerce or CVB	5%	--	7%
Books	5%	4%	20%
Internet--travel planning website	2%	2%	7%
Travel agents	2%	--	13%

\* See Appendix A for other methods of learning.

When asked which *one* method appeared to be most effective, respondents indicated past guests' family, friends and acquaintances (43%). For 23 percent of respondents, "other" methods of learning about their business was most important (see appendix for full list). The farmer/rancher's own family members/acquaintances were the most important method for first-time visitors to learn about the business 12 percent of the time.

**Table 20: Most Effective Method of Learning about Farm/Ranch Recreation**

Method	Frequency 2007	Percent 2007	Frequency 1997	Percent 1997
Family, friends, acquaintances of past guests	75	43%	47	40%
Other*	41	23%	-	-
Internet:	30	17%	3	3%
<i>Personal website</i>	14	8%		
<i>Travel MT Site</i>	8	5%		
<i>Internet association</i>	6	3%		
<i>Travel planning website</i>	2	1%		
Your family friends, acquaintances	21	12%	9	8%
Magazine/newspaper article	2	1%	9	8%
Books	2	1%	5	4%
Chamber of commerce or CVB	3	2%	6	5%
Travel agents	1	1%	3	3%

\* See Appendix A for other methods of learning

Many tourists are interested in eating and buying locally grown products, and selling products from the farm or ranch at farmers markets or roadside stands is certainly one type of recreation/tourism business that may be feasible for farmers and ranchers to operate. Table 21 provides the number of survey

respondents who participate in these types of activities. Fifty-eight respondents answered this question by selecting one or more of the options. The percentages in the third column are based on the total useable sample size of 530.

A similar question asked in the NASS questionnaire produced differing results. The NASS results showed that 31 percent of the farms surveyed participated in selling locally or at the state level directly to markets or consumers. The NASS results are substantially higher than the 15 percent (cumulative) identified by respondents of this study. To follow up this question, the NASS survey inquired about barriers to selling locally. Respondents listed many concerns and issues including marketing and market concerns, transportation concerns, and price/cost concerns. Table 22 provides a breakdown of concerns or issues identified by farmers and ranchers in the NASS survey.

**Table 21: Selling Agriculture Products Locally**

	Frequency	Percent
<b>Sell agriculture products at farmers markets</b>	26	5%
<b>Allow visitors to pick their own fruits or vegetables</b>	20	4%
<b>Sell agriculture products to local grocery stores</b>	19	4%
<b>Sell agriculture products to local restaurants</b>	12	2%
<b>Have a roadside stand</b>	4	1%

**Table 22: Barriers to Selling Products Locally**

	Frequency	Percent
<b>Market related</b>	357	30%
<b>No obstacles</b>	175	15%
<b>Transportation related</b>	148	13%
<b>Don't know</b>	147	13%
<b>Price/Cost</b>	144	12%
<b>Facilities/processing</b>	85	7%
<b>Time</b>	59	5%
<b>Government regulation</b>	51	4%
<b>Other*</b>	8	1%

\*see Appendix A for other barriers to selling products locally

At the time of the 1997 survey, Travel Montana had hosted approximately 13 agritourism workshops throughout the state with the goal of informing farmers and ranchers about opportunities to include tourism and recreation in their businesses. The workshops have not been offered since 2001, therefore one item on this survey asked respondents whether they would be interested in attending a one-day workshop. The workshop would focus on setting up and running a farm/ranch recreation/tourism business.

Of the 502 respondents who answered the question, 219 (43.6%) responded that, yes, they would be interested in attending such a workshop, while 283 (56.4%) responded that they would not be interested.



## DISCUSSION

### Reasons for Operating Recreation Businesses

The most important reasons for operating a recreation business were (1) additional income, (2) to fully utilize the resources, (3) fluctuations in agriculture income, and (4) to educate the consumer. The reasons for operating a recreation business are closely linked to the types of businesses that farms and ranches start. The most common agritourism businesses, like block management, meet many if not all of the most common reasons for operating an agritourism business.

- The highest-rated reason for operating recreation business(es) was additional income. Most respondents (78%) rely, to some degree, on livestock production for income, similar to the figure for 1997 (75%). During the 1997 study, low beef prices were described as a potential contributor to the operation of recreation businesses. It may be that fluctuations in other sources of farm/ranch income, such as those due to low beef prices, motivate people to seek other sources of income to help stabilize the farm/ranch income.
- Most respondents have large operations. Many own and operate in excess of 3000 acres, and many lease over 3000 acres. The second highest-rated reason for operating a recreation business was to fully utilize resources. The connection seems to be that large operations are trying to fully utilize that which is already available.
- The third-highest-rated reason for operating a recreation business was fluctuations in agriculture income. Again, three-fourths of respondents rely, in some way, on livestock production for income. On average, 50% of respondents' income was generated through livestock production. Livestock prices are very susceptible to market fluctuations. Diversifying into recreation may help offset fluctuations in agriculture product markets.
- The largest percent of respondents have been in agriculture over 30 years (59%). In 1997, according to Alan Baquet of Montana State University Extension, many farms/ranches in Montana are family operations, often passed down through several generations. This could explain why employment for family members rated reasonably high as a reason for operating recreation business(es). Operating a recreation business may provide extra income and employment for family members that will allow families to retain the farm/ranch.
- Tax incentives seemed to be the least important reason for operating a recreation business. During the 1997 study it was discovered that most government agriculture programs direct benefits towards crop producing activities. The sample population for the 2007 study was mainly (50%) livestock operations with only 18% making a portion of their income from crop production. Another explanation is that tax incentives and benefits brought on by entering into a conservation easement agreement are not guaranteed, and may limit the farm's or ranch's choices in future development.
- When asked about the future of their farm/ranch land, respondents indicated that in the next 10 years most did not plan to sell, lease, donate, or place their land in a conservation easement. Farming and ranching is not simply a business, but for many it is a lifelong profession, and this is supported by data showing that farmers and ranchers have been involved in agriculture for over 30 years (Figure 1). This study found that most farmers and ranchers have been in the business for a long time and the majority plan on staying in the business. Additionally, many farmers and ranchers in this sample use

recreation as means to additional income which may be a key to maintaining their agricultural lifestyle and current land use.

### **Obstacles to Recreation Business Operation**

Obstacles to operating a recreation business provide insight into farmers'/ranchers' concerns. The obstacles rated as most restrictive included (1) liability issues, (2) regulations and rules/legal constraints, (3) lack of time, and (4) lack of financial assistance/resources. Some of these concerns can be addressed by policymakers.

- The highest-rated obstacle was liability issues, and the second-highest-rated obstacle was regulations and rules/legal constraints. Farmers/ranchers *perceive* that rules and regulations are very restrictive, and some respondents indicated in their comments they want more information on this topic. Lawmakers could modify regulations and rules to make operating a recreation business easier and more efficient or improve farmers and ranchers understanding of rules and regulations.
- Policymakers have no control over lack of time (the third-highest-rated obstacle), although it is clear why this would certainly be an obstacle to operating a tourism or recreation business. Lack of time may be a contributing factor to the increase in block management. The block management program allows the farmer to utilize resources (e.g. wildlife) while minimizing the rancher's or farmer's time investment.
- Lack of financial assistance/resources (fourth highest-rated obstacle) can be addressed. In order to increase development of these tourism businesses, more financing opportunities should be available. These opportunities could be through financial institutions or through government programs (possibly United States Department of Agriculture, Small Business Administration, or Farmers Home Administration). Most farm/ranch employment opportunities were seasonal in nature. College students (especially those coming back to the area for the summer and having a background in agriculture) could fill the void. Farmers/ranchers could make contacts with placement offices or faculty members at Montana educational institutions (universities, technical colleges, community colleges). Students frequently look for summer employment (especially full-time), and the seasonal nature of these jobs makes them especially attractive to students.
- The NASS study identified many of the issues that may effectively bar farms and ranches from participating in selling products locally (see Table 22). Many of Montana's large farms and ranches are located in very rural areas with low population densities (e.g. much of Eastern MT). This, in combination with traffic flows being concentrated on interstates, may not provide a thriving environment for roadside stands, farmers markets or other methods of selling directly to the consumer. A further investigation of this trend shows that out of the 33 farmers markets found in the Montana Farmers Market Directory, 20 are found in the Glacier, Gold West and Yellowstone travel regions and the remainder (13) are found in Russell, Missouri River, and Custer travel regions. The three regions with the greatest number of farmers markets are less known as agricultural zones but better known for tourism while the reverse is true for Russell, Missouri River, and Custer travel regions.

## Popularity of Activities and New Activities Planned

Many new activities planned were rated as very popular by respondents currently offering these activities. For example, of the top 10 new activities planned (unguided hunting, watching wildlife, guided hunting, unguided fishing, ranch chores, hiking/nature walks, horseback riding, family style meals, cattle drives/herd riding, photo safari), six of them were rated in the top 10 as most popular currently offered activities.

This could be interpreted in several ways. Respondents are prudently adding activities that are already popular with guests. Eventually, however, the market could become saturated if too many similar opportunities exist. However, the latter interpretation could be further argued. Farm/ranch vacations are very unique experiences. Guests' experiences vary based on location differences and farm/ranch personnel. For example, experiences of farm/ranch guests would seem more dependent on the personalities of the farmers/ranchers than would the experiences of guests in other vacation markets (e.g., attractions, hotels, etc.). The relationship established between the farmer/rancher and his/her guest would seemingly be more intense and intimate since it is more one-on-one. Establishing a good rapport early in the vacation/experience would be very important.

The four activities which are in the top ten of activities planned but not in the top ten of most popular current activities are watching wildlife, ranch chores, hiking/nature walks and photo safari. Although these activities are not considered as most popular, it may be that these types of activities are possible for farmers and ranchers to offer, despite having limited time, and possibly resources, to devote to a farm/ranch recreation business. These four activities do not necessarily require that the farm or ranch has horses available for guests to ride, large numbers of livestock or facilities available for hosting overnight guests or preparing large meals. These particular activities can still allow farmers and ranchers to fully utilize their resources, diversify and supplement their income and educate the consumer without requiring significant inputs or facilities. For these reasons, it may certainly be worthwhile for farmers and ranchers to offer these activities despite the activities not being as popular as others that may be offered.

The Montana Department of Fish Wildlife and Parks (MFWP) Block Management Program and fee hunting and fishing were ranked high in both current businesses and in planned activities. Keeping the differences in sampling methods in mind, this is a notable change from the 1997 survey. Possible contributing factors to this growth are the continued maturation of the block management program, the limited time that farmers/ranchers have to spend on recreation businesses, and the wish to fully utilize resources.

According to MFWP, the block management program was started in 1985 and was then significantly expanded in 1996. New participants to the block managements program during the 1997 survey period may not have identified the block management program as readily as participants in the 2007 survey. For the 2007 hunting year, MFWP reports that there are 1,250 participating landowners enrolled, allotting about 8 million acres of land to the program.

Fee hunting and especially block management may also be popular due to the limited time requirements for participation. Block management is a partnership meant to take the burden of management off the landowner. The program is ideal for farmers and ranchers who rated time limitations as the third largest obstacle to farm and ranch tourism/recreation businesses. Finally, through the maturation of the block management program and because of the limited time requirement needed to participate, farmers and ranchers may find block management and even fee hunting and fishing as very effective ways of utilizing their resources.

## Visitor Origin

Keep in mind that no visitors were contacted for this survey; instead, this information was provided by businesses. Additionally, because little is known about visitors to Montana agritourism businesses, much of this discussion is built off detailed data of other visitor groups collected by the Institute for Tourism and Recreation Research.

- Most visitors (43%) originated in the western 1/3 of the US. This is a significant change from the 1997 study that showed most visitors (39%) were from the eastern 1/3 of the US. It is unknown what the causes of this trend may be. Much of the difference may be due to the sampling methods used in each of the studies. However, nonresident travel data collected by the Institute for Tourism and Recreation Research (ITRR) suggests that the majority of Montana visitors are from nearby states (<http://www.itrr.umt.edu/NicheNews06/2005TravChar.pdf>), which supports the finding that most visitors are from the west.
- Another explanation for the apparent growth in percentage of visitors from the western US since 1997 is the growth in participation in the FWP block management program. Block management is one of the most popular recreation and tourism businesses operated on farms and ranches. The majority (67%) of visitors to farm/ranch block management properties are from the western US and during the 1997 study block management was not identified as a popular rec/ tourism business.
- Wide open space may not be the only reason that 22% of the visitors come from the Midwest, but “The Wild West” may be the draw. Even though the Midwest thrives on agriculture, Midwest farmers rely on crop production more than cattle production. Therefore, Montana, with its mountainous terrain, open rangeland, and cattle production, still has a lure for Midwesterners.
- Just 3% of visitors originated in Europe. A possible explanation is that Europeans have been involved in agritourism for many years. The farms/ranches in Europe may capture their own market. However, “The Wild West” quality could be a good marketing tool. Nonresident travel data collected by ITRR also reflects a small percentage of European visitors to Montana, as is estimated by this survey (<http://www.itrr.umt.edu/NicheNews07/OverseasChar.pdf>).

## Guests' Method of Learning

The data suggest that, even in our world of high technology, word of mouth was the most effective way of attracting new guests: guests' family/friends/acquaintances and family/friends/acquaintances of the farmer/rancher were mentioned most often as initial methods of learning about the tourism/recreation business. Other methods of learning about the business were effective as well.

- Fish, Wildlife and Parks publications seemed to be effective. FWP publications were mentioned many times by respondents who selected “other” methods of learning (see Appendix A). “Other” was selected as an initial method of learning by 35.2 percent of respondents.
- The farmer/rancher's own website was selected by 22.2 percent of respondents. Other internet sources for first-time guests included the Travel MT website (12.2%) and travel planning websites (5.7%). This indicates that the internet is a valuable source of information for first-time guests. Developing their own website may be a valuable marketing tool for agritourism businesses.



## SUMMARY

Montana has a strong tourism industry that farms and ranches can and do utilize to augment their income, help manage resources, and educate Montana's visitors. The years since 1997 have continued to indicate that the agritourism industry is one of growth and change. Farmers and ranchers in recreation are operating a diverse range of businesses with participation in block management, fee hunting or fishing, and guest house/cabin rental making up the top tier of businesses.

It was stated in the 1997 agritourism report that diversifying into the farm/ranch recreation business provides the agricultural industry with additional income when prices for cattle and crops are in flux and allows owners of large acreage to fully utilize what is already at their fingertips. Ten years later, this is still an accurate statement. Farmers and ranchers are able to offer something which is desired by many people while making use of their resources and gaining additional income, often with relatively little required from them in terms of time commitments or additional infrastructure. With growing populations in Urban America, there is a need for open space, a relaxed atmosphere, and a different way of life (even if it is just a one-week vacation). The farmer/rancher can provide these opportunities simply because the resources are there.

Montana, with a promise of "Big Sky" and open space, is an ideal setting for farm/ranch recreation. Farms and ranches are an important part of Montana's cultural heritage. Agritourism provides opportunities to educate consumers about the farm and ranch way of life while helping farmers and ranchers stay in business, rather than potentially selling or developing the land. Whether providing vacationers with a glimpse into the ranch life-style or a resident with a place to hunt, the farm/ranch recreation business helps maintain the Montana quality of life.

## Appendix A

### “Other” Responses

#### “Other” Recreation/Tourism Businesses Currently Operated

Artist/ tapestry weaver  
Bar and grill  
Bird Hunting  
buffalo hunt operation  
christmas tree u-cut  
Cutting competition  
Dinosaur digs and fossil prospecting  
Fishing  
Fishing Lodge  
free Access fishing  
Free handicap hunting  
Free hunting  
Free hunting and fishing  
Free pheasant, antelope Hunting  
FWP land Sponership program  
FWP Pheasant release  
Historic tours  
Horse boarding and training  
horse drawn carrage rides tours (located in West Yellowston MT)  
lease hunting rights  
lease land to hunters  
Lease out to outfitters  
local Garden  
open fishing to those that ask  
Organic Operation  
Out of state sponser  
Paleontology  
Paleontology  
pottery classes  
rent hunting right to outfitters  
rent property to outfitter  
restricted hunting (main) and x-country skiing (secondary)  
School class Field-day  
Sheep management, etc.  
Sight seeing  
Some Free hunting  
Team Roping  
Team Roping  
tractor collection  
trapping  
upland birds, duck, geese

## **“Other” Recreation/Tourism Businesses to Start or Expand in Next 5 Years**

4-wheel area  
Art, wood decorations  
Bird Hunting  
Bird watching  
Cabin Rent  
Children's horse camps  
dinosaur digs  
fee fishing  
Game Processing  
girls camp  
Horse seminars  
Indian Teepee rings  
jeep tours and rental  
Lease hunting ground  
Motel  
Organic Operation  
Pottery on ranch clay site  
Rattlesnake hunting viewing  
Trips for relatives and family  
Wool/ fiber art retreats

## **“Other” Activities Offered**

4 wheelers and Branding  
art studio visit  
ATV Riding  
Bird Watching  
camp fire singing  
Dinosaur digs and Fossil Prospecting  
Drinking  
Farm Fair day  
Fine Dining  
Handicap hunting (free)  
Hunting  
parentology  
Pitchfork fondues  
Ranch produced products /guest participation  
rattlesnake hunts  
Rustic Cabin Camping  
Sheep Management-lambing-doctoring-sheeting-wool processing-weaving-spinning  
Square dances

## **“Other” Enterprises for Income Allocations**

art sales  
Bar and Grill  
Block management  
Block management  
Block management  
Block management  
Block management  
Block management  
Crop Insurance+ USDA  
CRP  
CRP  
CRP  
CRP  
CRP  
CRP  
CRP  
CRP  
Dinosaur Digs  
Dude Ranch  
farm programs  
FWP Block management  
Govt farm program  
Gov't Leases and other  
gov't payments  
Gov't payments  
Gravel pit heavy Equipment operator, excavation  
Guest Ranch  
hayng  
horse training  
horseback packtrips  
Insurance/ Gov't programs  
Investments  
Investments  
Investments  
land sales  
loan, sales, etc.  
Lodge  
mutual Funds  
off farm jobs  
pension  
prototype design  
Rents  
Retire Pension  
Retirement  
Self Employed at home

Social Security  
Social Security  
sold land  
Subsidies and specialty crops custom work  
USDA  
welding business  
Wife's income  
Wife's income  
Wife's income

**“Other” Origin of Guests**

Australia  
Australia/ New Zealand  
Australia  
Australia  
Australia  
Ireland  
Mexico  
Mexico  
New Zealand  
South Africa  
South America

**“Other” Sources for First-time Guests Learning About Recreation/Tourism Business**

Ad in gunlist  
Booking agent  
Booking agent  
Brochures  
Classified ads  
Contacted by outfitter  
Custer country  
Custer Country travel Guide  
Don's Store  
Dude Ranch Association  
Flier  
Fliers, business cards  
FWP Publications  
FWP Publications  
FWP Publications  
FWP Publications  
FWP Publications  
FWP Publications  
FWP Publications



Newspaper ads  
Outfitter  
Outfitter  
Outfitter  
Outfitter  
Outfitter  
Outfitter  
Outfitter Hunting Website  
outfitter websites  
Outfitters  
Outfitters come to us  
Private Club  
Sports Shows  
Sports stores  
Television  
Television  
Tourism business is operated in established tourism areas  
White deer hunt promotion hunting leased to outfitters  
Word of mouth  
Word of mouth  
Word of mouth  
Word of mouth

## APPENDIX B

### COMMENTS MONTANA FARM & RANCH RECREATION BUSINESS ASSESSMENT

102: Montana is a very beautiful state however it is a very poor state to do business in. Very anti-business attitude, property taxes are very out of reason and getting worse fast.

107: we have a tremendous amount of prairie dogs and gophers and have been letting people hunts all they want for free. We are thinking maybe we should charge a fee. Our expenses are up and we are loosing Ag program payments. It is getting extremely difficult to make ends meet. We are even considering selling some land. We are in about our tenth year of drought (some years have been worse than others). Our cattle numbers are down. It's hard to make things work unless something changes. Block management helps some, but with the drought etc. we have less hunters (no geese for several years) payments decreased too. It is only a drop in the bucket at least. If our government wants cheap food they should subsidize their farmers. In our area of dry land farming and ranching we are limited as to what would work in the recreation tourism business and I don't know if people would pay a fee for something they haven't had to in the past.

116: I have friends come hunting they enjoy the ranch life and looking the country over would be interested in expanding this if could get good people to come. And may charge a fee. As of now don't charge anything.

117: The hunting we have had on the ranch is as before we owned it. We have no interests in expanding such a business. We have NO interest in participating in this or any other study.

139: We originally participated in FWP block management to control over populations of wildlife. That goal is being addressed and we have grown to appreciate extra income and caliber of courteous hunters through block management.

147: We are involved in the FW&P block management and rent out rooms to hunters and occasional guests

153: Our lodge just recently opened in October 2006. We would like to offer as much as possible for our guests and we are hoping that our guest return for many years. We have had four separate customers stay from n. Mexico, Minnesota, Utah, and Montana since opening in 2006.

160: All we do is block program to manage the hunters so we can keep it open to all.

166: harvest potential, 10-15 deer, 50 rooster pheasants, few upland game birds, few geese, and few antelope.

167: After reading your question I can see on this ranch (16000 acres) in sweet grass hills there would be possibilities for recreation etc. MAJOR PROBLEM we signed an easement with Fish and Wildlife service mostly to protect the native grass and wildlife. We did not realize how

restrictive it is. For example after signing we were advised of rule one residence. This means to FSW we can't sleep in the barn -during calving-

172: This is a cattle and haying operation only. We are in block management for hunting even though we could lease that out for much more but then where would the average person have to hunt?

189: We are working with a local guest ranch to develop the Cattle drive / recreation opportunity. Started last year but got no bookings. Do a limited amount of fee-fishing with the same guest ranch. Block management has been our major involvement but we would like to pursue other opportunities.

228: If I had to live off this I would starve to death!

238: We are a working cattle ranch only. We do not offer recreation or vacations. Friends stop by to fish from time to time, without fee. We are in block management for hunting to help control the large deer population (whitetail) here.

239: Gross income is very misleading as net return from recreation is very high due to low expenses. e.g., we already own the land thus recreation is very much incremental income with very minimal supporting expenses.

243: My grandparents did homestead ownership and the ranch has been in my family since. We hope to pass it on to our son this year.

252: At this time we are not involved in any rec tourism business.

293: We are thinking of setting-up a cabin or two for guest to rent for short vacations.

337: We are presently looking into a broader more lucrative form of ranch recreation. We now operate a hunting lease, a trespassers fee, to gain more income for the ranch.

338: We run a cow/calf operation in which people like to ride and help (liability is a big problems) wildlife running out of our ears but do not know how to get people to come and take pictures ( advertise but people do not want to come and pay to look).

344: We are just starting a business and all the hunters have been walk in only and are truly the best kind.

347: We get about 75 deer and elf hunters in hunting season.

378: We lease a limited no. of hunts to a guide and he does the work plus makes all contacts. All we do is make the land available and keep other hunter off.

395: We work with FWP and have enjoyed the hunters with FWP.

407: Government policy and regulation will eventually drive the family ranch out of existence. I have had two businesses that were successful operations wiped out by Government involvement that eventually wiped out the income and the enjoyment of the operation. Tax dollars, which I have paid plenty, are being spent to support a variety of non-producers that bleed initiative and funds from productive endeavors. Productivity is producing a tangible and profitable product. Not trading dollars

409: I believe that the environmental groups have done great harm to our state. We need to harvest our natural resources to produce for our education system, under privileged people, and build our economy. The farmers and ranchers have done a far better job in taking care of Montana lands than any environmental group.

410: We have put our real estate in a revocable family trust and invested in a large insurance policy which is in an irrevocable trust. We hope this plan will allow successful transfer of our assets to our children. Our ranch is leased out to an outfitter who has a camp here. This is working out very well.

419: We would like to shift our focus to a small guest ranch / cabin rental business. I attended a ranch recreation workshop about 15 years ago and really haven't seen much activity in our area or read /heard of the market. I would like to attend any workshops that would address what the market is, how or where to access it, writing a business plan, and possibly what financial assistance might be available through the state agencies.

424: Promote Ag- not allow it to be a memory in a history book. Work to get Ag products equal to or greater than the cost of input. Grain prices remain at depression prices while our costs have increased beyond many people's ability to remain in Ag.

428: We believe in diversifying to sustain the agriculture way of life. This includes harvesting in Ag-related businesses or leasing land for agriculture related businesses that promote conservation (e.g., wind energy).

452: I would like to start a trail ride + bed and breakfast but Montana zoning regs and health regs prevent it. So I am only left subdividing.

455: We currently lease our ranch 17,000 + acres to a guy who owns his own outfitting business we provide a lodge and the land. We previously participated in the Block management program for 3 years. We did attend a 12 day workshop on starting a Dude ranch 10 years ago, but the start-up costs were more than we anticipated at that time. It does remain an idea we may pursue at some point.

459: There are many obstacles to starting or expanding a recreational business especially an outfitting one. I think we need to push for more [unreadable] and less restitution and regulations. In my opinion the best scenario is when we get all the tourists' money show them a great time and they go home instead of buying a place and moving out here. The real estate agents have done too good a job at selling Montana. We outfitters need to sell our "Montana" that way, without getting the people we [unreadable] out, to come back and live here.

460: Our dinosaur digs and fossil prospecting tours are operated by an independent company which pays a fee per each person who visits our ranch. We also became 50-50 owners of any significant fossil found.

461: State wildlife regulations limit our recreation potential (with hunting). The tremendous concern over liability for the little money you make. To host people for recreation requires lots of time and people.

463: Curious to hear how using recreation will change value of land for inheritance purposes. What will determine land value~ recreation or agriculture?

466: Liability is a major legal concern when outsiders come onto the place.

471: I can't believe how many questions you came up with. I was ready to chuck the whole thing.

477: We used to be in block management hunting for 12 years but so many hunters called and came that we now allow a neighbor (friend) to guide for the first two weeks of big game season for elk, deer and antelope- Then we open to free general hunting. We appreciate the money out guide pays. And we have full bird season guided paid hunting too. We do not plan to expand our current program.

479: Trying to quit. Don't plan to expand.

481: Some of these questions weren't really applicable. I provide land and sponsor 1-2 out of state hunters. I work with a local outfitter, who provided most all of the service and the expertise. I am pretty much a "silent partner"

483: I didn't know that block management counted, but it is a good source of money for us and the neighbors in it.

484: FWP block management is our only activity that applies here. My wife would like to start a tourist entertainment / dinner place -county supper-

499: q4- I don't consider block management as a business- it is just a tool to manage hunting issues

575: We are in block management + number hunter very from year to year. Cattle drives involve neighbors and friends being involved only as trading work or their enjoyment.

591: FWP block management program 400-500 annual day use.

602: There needs to be more information on legal liability for tourism/ recreation available to land owners. Maybe push more commercial information onto TV ads travel channel, food network, and such. Do more in -state promotion as well.

619: Have Montana change its anti-business mindset. Eastern MT is NOT western MT.

632: We get a lot of hunting activity. We do not make a lot of money off this but the quality of our place attracts them. This gives the hunters quality time with their families and friends and is usually part of their best vacation experience for the year. Maybe we should get out of block management and charge big dollars, but we don't think it should be a "rich" man's sport.

673: Block management with Fish and game is the only extra thing this ranch does. It has worked good. But always looking for other options [unreadable].

676: Principally we do the fish and wildlife BLM program plus off season horseback riding using their own horses. Also, hiking.

691: The most sought after recreation for us is a place to ride ATV's. This is because hunting is limited by season length. Prairie dog shooting is a very lucrative thing. I actually have more interests in Prairie dog shooting than big game hunting. Managing upland bird hunting by planting berry bushes and shrubs could be very lucrative. Keeping predator levels and populations low is very important for our current recreation opportunities. Hunting and calling predators requires extreme skill and we have one group from PA that comes each year. However, we receive 30 times the number of big game hunters so more huntable wildlife is far more important than predators and we can't support both large numbers of hunters and predators.

704: We lease land to an outfitter to help control deer numbers and trespassers.

706: our recreation "business" is block management. Most of the questions (18-27) don't apply.

707: We just don't sell recreation

715: If things don't change soon and all the family farms are gone you will see a change in our food supply. We are barely making ends meet at these prices. No wonder all the young people do other things. They know how much work it is and how much income is left when all the bills are paid. My self- CRP is lookin' pretty good. 700 acres going in this spring. Bye-bye farm land. I'm sick of all the crap from stealing your protein in grain to the railroad gouging us on freight. If these surveys are so hush hush, why do they have a number? You can do all the surveys you want but it is not addressing the problem, we are losing our young people because there is no money for all the time and hard work. I have been in it all my life and I am sick of getting screwed.

758: When we marked 5 people working year round it includes 3 children who "help out". It's mainly run by my husband and me.

761: Block management. Not really sure how many are repeats and where they are from.

767: most of my tapestries are sold in galleries off the ranch. A few are sold to people visiting the ranch for other reasons. My subject matter is mostly the landscape around here, so that does make the ranch an important aspect of my livelihood.

775: Land is all Indian Trust Land.

782: Badland Cattle

795: organic farming has made my farm viable I have been organic since 1999.

797: We don't need any more "how to" workshops. We need to inspect or weed out those who provide poor service and facilities + those who use horses, cattle events, activities without insurance to protect the tourist. (horse, tourism, bus. Liability) we need to fine or shut down those who do not pay state accom tax. This all should apply to tribes and tribal or Native Americans too. If they live and operate within the state of MT.

798: This is a 100 percent cow calf operation. Except very little block management.

812: Rec/tourism is great for those that have the quality experience the consumer wants. i.e. location and facilities. Not all (in fact, few) have that. Therefore, this opportunity only exists for a small number of farms/ ranches.

828: This ranch is just a working ranch other than the FWP block management program. Boone and Crockett does have an education program separate from the ranch. However, it would not fit the recreation business model.

830: We started with just hunting via word of mouth. We are now starting to get vacation request via the internet. Montana planner -meant to get a "paying" ad in this year missed the deadline.

851: The only reason for me to participate in block management is to help control deer population. The dollars are nice. But certainly not the reason I participate.

868: With the rising costs of everything additional income is certainly welcome especially when your location and possible use of a good property for such a business.

886: You didn't include having folks come in to shoot fish wildlife and park gophers!

891: The entire ranch has been placed under a conservation easement which limits recreation for profit. The ranch is open to all for fishing hunting and sight seeing.

917: We operate a working ranch for adults with disabilities we hope to move into the agritourism area in the near future. Please send me a copy of the survey results.

918: Until liability issues are covered it is hard to expand.

940: We'd like to know the results of this survey.

943: Our ranch is a family working cattle ranch and is not set up for making it a recreation area

946: I don't know if we are interested in this. It takes so much time to get it to work for you.

961: This operation is a bird hunting club only. It is made up of 6 members who invite guests.

979: I am based out of the farm ranch but operate tourism business in established tourism areas at this time.

984: We do not have a guest ranch!

1004: Insurance- for horse activities is not available in Montana, most people have found LLC. To get around lack of insurance.

1013: Hunting at this point in history is very much in demand. We simply charge for it because there are people willing to pay the price.

1047: This is our first year with the Montana working ranches business so we don't have a good idea yet how it will be in the future.

1098: I am restoring the old family homestead to rent out as a seasonal vacation home. Original part was built in 1866. I expect people who are interested in the past to be the customers. The house is filled with the family heirlooms. I will open my doors may 6th 2007. My website [www.thefentonhousemt.com](http://www.thefentonhousemt.com) I am in the process of being listed as a historical site.

1108: You needed to have a "none" box answer for most of the questions.

1143: I intend to get into more and more farm/ranch tourism in the future. There is currently not much of this type of business going on in my area and the potential is there.

1150: I live in fort Bel knap Indian rez and would like to focus on cultural activities e.g. TP village, drum groups/ dance troops etc., There are also some TP tings (numerous) around my place I'd like to develop someday.

1152: we do not have any sort of tourism on our [unreadable] or do we consider and in the future. Location plus lack of water etc make it almost impossible at this time

1159: We stayed in working agritourism in Italy 2003 for eight weeks. Italy financially subsidizes the development and repair of farms. The owners received over a million dollars of incentive monies and tax benefits for their 40 acres- 17 acres were put back into the grape production and improved/ rebuilt the winery. The farm had diverse crop production- olives, cherries, apples, truck garden, grapes, and small grains. The villa was restored, updated bathrooms, common kitchen, grounds, including new swimming pool and developed nature trails

between villa and local community so guests could participate in local activities, including weekly farmers market. The villa provided activities in local cooking, language, opera, history and unguided local tours. Italy has invested in agritourism to preserve and support those willing to teach others about a diminishing lifestyle, local conservation, and historical significance of agriculture while providing recreation experiences.

1164: We are looking forward to having a B&B plus a holiday house rental on the ranch which is a working horse breeding and hay production ranch. We have lots of summer and winter sports equipment and would like to conduct photo tours for wildlife and old west

1195: We should be able to use USFS land to do recreational projects at least be able to get a permit!

1196: I plan on expending my acreage so I can bring my son on to the operation full time.

1209: There are only cattle on this ranch and nothing else.

1230: We have cutting horses and clients come to the ranch for week long cutting practices, etc. help with cattle. We have not worked very hard to build the part of the business as we don't have lodging facilities. Hope this is helpful.

1237: I think there is potential for Ag tourism on my farm/ranch. My limitation is my time.

1252: my land is presently under conservation easements: 160 acres nature conservancy 100 acres Montana land reliance

1254: Farmin + ranchins a [EDITED]. Ya gotta make it where ya can.

1272: We are in a very remote location. Our roads do not have good gravel, which makes transportation difficult part of the year. This has an impact on any plans to have regular guests. We are located 40 miles from the nearest hotel and grocery store.

1297: A farmer or rancher should be able to make it. We should not have to resort of recreation or tourism business to live.

1321: We have a mobile home on our property which I would like to rent out to hunters during hunting season. We have pheasant, mule deer, and antelope. I don't want permanent year round renter- use seasonal. I might be willing to cook meals for them.

1326: We had one opportunity to take 10 people on a wagon ride + feed them. They paid a minimal amount that barely covered food.

1342: I would be interested in information on hunting block management.

1366: I am so busy trying to make a living on this ranch I have never studied being a ranch recreation. So not know how to get started.

1376: We do not have a fee barred business. We do invite and encourage individuals to hike, [unreadable] etc. As well as groups such as the Native Plant Society and Nature Conservancy. At some time in the future we may try advertising and charging a fee for these activities we try to keep a line of communication open with groups and people who can help us promote conservation and preservation of native grasslands.

1398: Becoming involved in tourism-recreation activities is not out of the question, but no definite plans to do so or to what extent are currently under active consideration.

1411: I would like to see this survey published in the prairie star.

1435: Family health issues have prevented us from more actively pursuing the venture.

1441: We would be interested in building/ business grants or scholarship programs, Internship opportunities we could offer, exchange (us or foreign) programs we could participate in. We offer riding lessons, equine health, boarding, trail rides, herding, all aspects of the sheep industry (lambing, shearing) working vacations need regulatory (licensing info. Also info on state health regulations and liability)

1443: was involved with fee hunting for 3 or four years. The past 2 years was not involved. Lots of work and often at times when our labor was needed elsewhere. Deer populations and outfitters license and total number of customs needed top be viable all factors in shutting us down.

1461: Would like some information of bed and breakfasts.

1466: Sportsman groups need to stop trying to take away private property rights!