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A University of Tennessee - Farm Bureau Partnership

UT Extension
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# A Snapshot of Tennessee Agritourism:

# Results from the 2003 Enterprise Inventory


October 2004

THE UNIVERSITY of TENNESSEE

# Foreword

This publication is a product of the Tennessee Agritourism Initiative. The information it contains is a result of a 2003 inventory of 210 agritourism enterprises in Tennessee and has several potential uses. The Tennessee Agritourism Initiative partners have already gained valuable knowledge about the agritourism industry in the state and the needs of agritourism operators. We also hope this publication is useful to existing and emerging agritourism entrepreneurs and educators in Tennessee and other states by providing a snapshot of experiences and insight of agritourism operators.

In addition to contributing data for this study, the 2003 enterprise inventory provided information to the initiative partners enabling the promotion of the 210 participating enterprises. The enterprises are listed on the Tennessee Department of Agriculture's *Pick Tennessee Products* Web site at *http://picktnproducts.org*. Tennessee agritourism enterprises not already listed may be added to the list by following the directions on the Web site or by calling (615) 837-5160.

The 2003 agritourism inventory and this resulting publication would not have been possible without the contributions of many. The contact list for the inventory was developed with the assistance of numerous individuals in UT Extension, the Tennessee Farm Bureau Federation, commodity organizations, chambers of commerce, tourism groups and media outlets. Special recognition is given to Kim Martinez for her work in assembling a contact list of enterprises and providing other assistance. Initiative steering committee members and John Salazar reviewed the questionnaire, and Becky Stephens and staff of the University of Tennessee Forestry, Wildlife and Fisheries Department's Human Dimensions Research Lab conducted the interviews and provided data analysis services. The cooperation of the agritourism operators who participated in the interviews was vital to the success of this study. Nancy Edwards, of Valley Home Farm in Wartrace, Tennessee, generously shared photographs from her operation for the publication. Peer reviews of this publication were conducted by Joe Gaines, Kim Jensen, John Salazar, Alan Galloway and Wanda Russell, with layout and design completed by Kim Stallings. Funding for the project was provided, in part, by USDA Rural Development.

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USDA Rural Development
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PICK Tennessee PRODUCTS

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# *A Snapshot of Tennessee Agritourism:* Results from the 2003 Enterprise Inventory

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**This project was completed for the Tennessee Agritourism Initiative, a partnership of the Tennessee Departments of Agriculture, Tourist Development and Economic and Community Development, University of Tennessee Extension and the Tennessee Farm Bureau Federation. Funding was provided in part by USDA Rural Development.**

## Executive Summary

A total of 210 existing agritourism enterprises were successfully contacted in the fall of 2003 to participate in a survey by the Tennessee Agritourism Initiative. The purpose of this study was to identify characteristics of the agritourism industry in Tennessee and to identify issues and obstacles faced by agritourism enterprises that may be addressed through research, teaching and outreach.

Approximately 80 percent of enterprises offer visitors more than one attraction, and 60 percent of enterprises are open only seasonally. The operators identified advertising, marketing and promotions as the most important factors of success for their enterprises.

Additional information was learned about typical agritourism enterprise customers. Survey respondents reported that 85 percent of total visitors to their enterprises were from in-state. Half of visitors were reported as being one-time visitors to enterprises. Ten percent of total visitors in 2002 were part of organized group visits. Half of the visitors in groups were part of school groups, and another 15 percent of visitors in groups were part of travel or tour groups.

Agritourism has a significant impact on Tennessee's economy. Respondents accounted for approximately 3.5 million visitors in 2002. Customers spent up to $400 per visit at agritourism enterprises in 2002, with 30 percent of enterprises earning between $1 and $10 per visitor. Annual gross sales for enterprises in 2002 ranged from $0 to more than $1 million. Enterprises accounted for a significant number of full- and part-time jobs both year-round and seasonally. Approximately 63 percent of respondents had plans to expand their operation in the next three years.

The inventory also provided information on the issues and obstacles faced by agritourism operators and identified topics in need of research, education and outreach. Survey respondents reported that they have the most difficulty on average in "promoting their enterprises" and "finding and hiring qualified employees." They also experience "some difficulty" with "liability insurance," "identifying markets," "signage," "preparing business plans" and "financing issues." Approximately one-third of enterprise operators identified "advertising, marketing and promotions" issues as being an area where service is needed. Approximately 11 percent of respondents reported that "money and funding" were needed. The relatively large number of respondents who did not know answers to several key benchmark evaluation measures also indicated a need for education and outreach.

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# Background

## The Tennessee Agritourism Initiative

In the spring of 2003, the Tennessee Departments of Agriculture, Tourist Development and Economic and Community Development, University of Tennessee Extension and the Tennessee Farm Bureau Federation joined together to establish the Tennessee Agritourism Initiative. The majority of the initiative was funded by a federal grant from USDA Rural Development. The initiative was led by a steering committee of representatives from each of the initiative partners.

The initiative was developed with three major objectives to be implemented in two phases. The primary objectives were to 1) build farm income through agritourism, 2) expand tourism income within rural communities, and 3) establish a sustainable, long-term program.

The first phase was designed for implementation from July 2003 to June 2005. This phase included a comprehensive inventory and assessment of existing agritourism enterprises, development of training workshops and training materials and development of promotional campaigns targeting consumers and visitors of agritourism attractions. The second phase of the initiative was to be implemented from July 2004 to June 2006. It was a continuation of phase one educational and promotional activities and also included an evaluation of initiative impact.

## Definition of Agritourism

Members of the steering committee developed a definition of agritourism to help guide initiative activities. For the purposes of the initiative, *agritourism* is defined as "an activity, enterprise or business which combines primary elements and characteristics of Tennessee agriculture and tourism and provides an experience for visitors which stimulates economic activity and impacts both farm and community income." Attractions that often meet this definition include:

- Agriculture-related museums
- Agriculture-related festivals and fairs
- Century farms
- Corn-maze enterprises
- Farmers' markets
- On-farm tours
- On-farm retail markets
- On-farm vacations
- On-farm festivals and fairs
- On-farm petting zoos
- On-farm fee-fishing
- On-farm horseback riding
- On-farm bed and breakfasts
- Pick-your-own farms
- Wineries

## Study Objectives

Under the direction of the *Center for Profitable Agriculture* (CPA), the following four objectives were developed for the inventory of Tennessee's existing agritourism enterprises:

1. Identify existing agritourism enterprises in Tennessee that are interested in being included with Tennessee agritourism promotions,
2. Collect information needed to include each enterprise in promotional activities,
3. Identify issues/obstacles faced by agritourism enterprises that may be addressed through research, teaching and outreach, and
4. Identify characteristics of the agritourism industry in Tennessee.

## Survey Sample, Procedure and Response

The following four methods were used to assemble a contact list of suspected, existing agritourism enterprises:

1. A press release was written and distributed through the University of Tennessee Institute of Agriculture Marketing and Communications Department. The release had confirmed use by 23 media outlets with a total circulation of 260,711.[1] The news release requested that operators of existing agritourism enterprises submit their contact information to the CPA.

[1] Clark, Patricia. Personal correspondence. May 2, 2004.

2. An e-mail message was sent to more than 500 UT Extension personnel asking them to submit contact information for known agritourism operations in their communities and included the press release for use in local media.
3. More than 300 chambers of commerce, commodity organizations and other agricultural-related organizations were sent letters, including the press release, asking them to make submissions and promote the initiative to their membership.
4. The CPA staff searched on the Internet for existing agritourism enterprises listed on the Tennessee Department of Agriculture and/or the Department of Tourist Development Web sites.

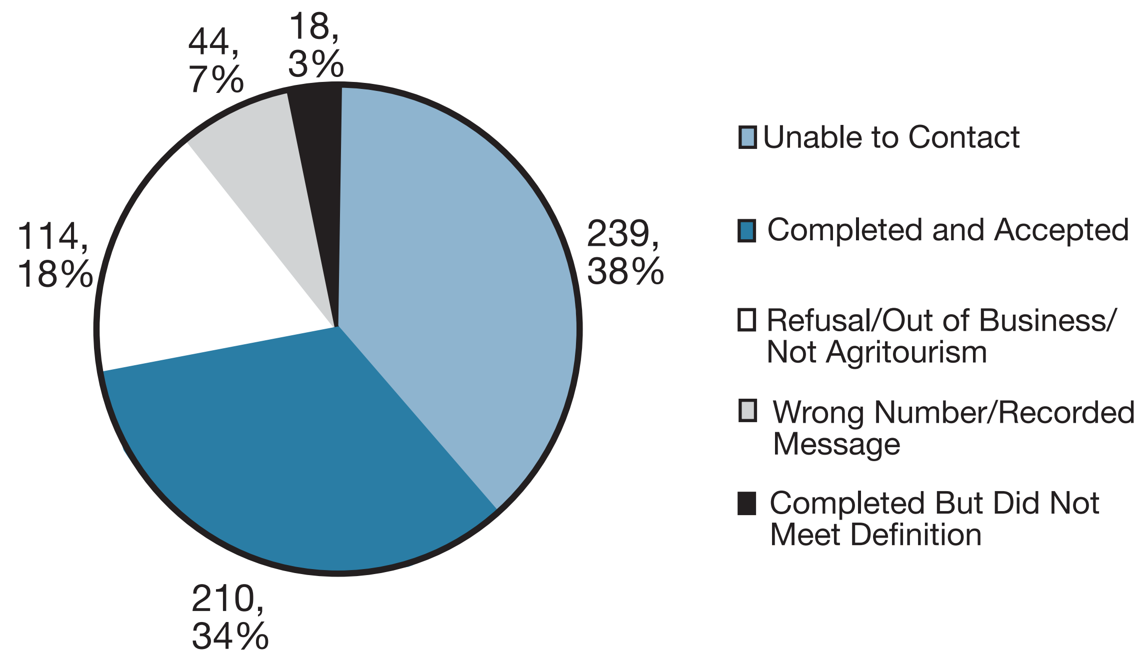
These efforts collected 625 suspected, existing agritourism operations to be included on the contact list for the inventory. A questionnaire consisting of three sections and 31 questions was developed by the CPA and reviewed by members of the steering committee and John Salazar, Director of the University of Tennessee Tourism Institute. Telephone interviews were conducted by the University of Tennessee Forestry, Wildlife and Fisheries Department's Human Dimensions Research Lab. Interviewing began on October 1 and ended on November 22, 2003. Three to five attempts to contact suspected enterprises in the sample were made on various days of the week and at various times of the day.

Questions in the first section of the survey confirmed whether or not the contact was an owner or operator of a Tennessee agritourism attraction, obtained permission to include the enterprise in the initiative activities and determined the type of attraction(s) offered. The second section collected information needed to include the enterprise in the promotional activities of the initiative. The final section collected operational data and operator estimates and opinions. A copy of the questionnaire is included in the Appendix.

Following the interview phase, the steering committee's "definition subcommittee" reviewed the data from the first section of the survey. This review determined whether the enterprises indeed matched the definition of agritourism as stipulated by the steering committee. Data for enterprises not meeting the definition were excluded from analyses.

Two hundred and ten surveys were completed and accepted by the definition subcommittee, for an accepted response rate of 34 percent. Only 14 surveys were rejected by the definition subcommittee. One hundred fourteen enterprise operators refused to participate in the survey, citing that they did not consider themselves involved in agritourism or were no longer in business. The original contact list included 44 wrong numbers or numbers with a recorded message. The remaining 239 contacts on the list, 38 percent of the total, could not be reached. It was necessary for the initiative activities to conduct survey interviews during the fall season, which is when many agritourism enterprises are involved in their busiest marketing season and, thus, very difficult to reach. Figure 1 shows the percent of the 625 suspected enterprises on the original contact list by response category.

**Figure 1: Number and Percent of 625 Enterprises on Survey Contact List by Response Category**




# Summary of Survey Results

## *Number and Location of Enterprises*

Seventy-five of Tennessee's 95 counties were represented by the 210 survey respondents with agritourism operations meeting the initiative's definition. Figure 2 (located on the inside back cover) and Table 1 (below) illustrate the distribution of participating agritourism enterprises by county. Cumberland, McMinn and Williamson counties had the largest number of enterprises, with eight each. Knox, Putnam and Sevier counties followed closely with seven agritourism enterprises each.

**Table 1: Counties by Number of Enterprises**

| Number of Enterprises | Counties | Number of Counties |
|---|---|---|
| 8 | Cumberland, McMinn, Williamson | 3 |
| 7 | Knox, Putnam, Sevier | 3 |
| 5 | Anderson, Davidson, Hamilton, Overton, Sumner | 5 |
| 4 | Bledsoe, Gibson, Greene, Jefferson, Lauderdale, Macon, Montgomery, Robertson, Sullivan, White, Wilson | 11 |
| 3 | Blount, Fentress, Grainger, Hardin, Henry, Hickman, Lawrence, Loudon, Maury, Obion, Rutherford | 11 |
| 2 | Bedford, Bradley, Coffee, Crockett, Dyer, Fayette, Giles, Grundy, Hamblen, Hawkins, Haywood, Humphreys, Lincoln, McNairy, Pickett, Rhea, Polk, Roane, Smith, Trousdale, Warren, Washington | 22 |
| 1 | Benton, Campbell, Carroll, Claiborne, Cocke, Franklin, Jackson, Johnson, Madison, Marion, Marshall, Monroe, Moore, Morgan, Sequatchie, Shelby, Tipton, Unicoi, Wayne, Weakley | 20 |
| Note: One enterprise reported two counties as the business location. The enterprise is credited to both counties. | | |

At this point, it may be helpful to clearly distinguish between the definitions of the terms enterprise and attraction as used in this publication. The term enterprise refers to the overall agritourism operation, which includes one or more attractions. The term attraction refers to each of the individual activities that may be offered to customers at an agritourism enterprise. For example, the enterprise called "Smith's Farm" may offer several attractions, such as a corn maze, petting zoo and a pumpkin patch.

## Types of Attractions

Attractions offered at agritourism enterprises are often only limited by one's imagination. An individual agritourism enterprise may offer more than one attraction or activity to visitors. In fact, approximately 80 percent of enterprises participating in the study offer more than one attraction. Almost a quarter of the enterprises, 24 percent, offer three attractions, while almost 18 percent offer four attractions. Table 2 describes the number of enterprises offering different numbers of attractions.

**Table 2: Number of Enterprises with Certain Number of Attractions**

| Number of Attractions | Number of Enterprises | Percent of Enterprises |
|---|---|---|
| 1 | 39 | 18.6 |
| 2 | 41 | 19.5 |
| 3 | 51 | 24.3 |
| 4 | 37 | 17.6 |
| 5 | 17 | 8.1 |
| 6 | 11 | 5.2 |
| 7 | 7 | 3.3 |
| 8 | 5 | 2.4 |
| 9 | 2 | 1.0 |
| *Total* | *210* | *100.0* |

The survey asked respondents to identify the attractions offered at their enterprise according to 17 predefined categories and an "other" category. Sixty-one percent of enterprises stated that they had an "on-farm retail market," and almost 44 percent of enterprises offer an "on-farm tour."[2] A quarter of enterprises offer a "pick-your-own" attraction. More than 50 percent of enterprises also reported an attraction not fitting the options included in the predefined list. "Other" attractions reported included bakeries, campgrounds, horse boarding, catering, restaurants, cider mills, display gardens, educational programs, day camps, exhibits and shows, hay mazes and wildlife viewing. Table 3 lists the number and percent of enterprises for each attraction type.

It is interesting to consider whether enterprises reporting a specific number of attractions are more likely to offer specific attractions. Table 4 illustrates the percentage of enterprises reporting each attraction type by the number of attractions per enterprise. For enterprises reported as "farmers' markets," 40 percent reported offering one attraction. Thirty-five percent of "cut-your-own Christmas tree" operations offer two attractions, and 90 percent of "cut-your-own Christmas tree" operations offer up to four attractions. A quarter of enterprises with "fee-fishing" offer eight attractions. Enterprises offering "on-farm horseback riding" did not offer less than four attractions, and half of enterprises offering "on-farm horseback riding" offered four attractions. Other attractions that were not offered as a sole attraction for enterprises included a "century farm," "corn maze," "on-farm vacation," "on-farm petting zoo" and "pumpkin patch."

Correlation analysis reveals that some attractions are likely to be offered in combination with other attractions by a single enterprise. Table 5 shows the correlation coefficient for attraction combinations with significant, positive correlations.

Attractions with a positive correlation are typically complementary to one another. Perfect positive correlation, a correlation coefficient of 1, would occur if all enterprises with a specific attraction also offered a second specific attraction. None of the attraction combinations showed perfect positive correlation. The highest correlation is found between "corn mazes"

[2] Percentages of enterprises reporting each attraction type will add to greater than 100 because multiple attraction types per enterprise were allowed.

and "pumpkin patches," with a coefficient of 0.556. An enterprise with a "corn maze" is also likely to offer a "pumpkin patch," but not every enterprise with a "corn maze" has a "pumpkin patch." As the value of the correlation coefficient decreases toward zero, the likelihood that the attraction combination will exist also decreases, although some level of likelihood is still implied.

## Table 3: Enterprises and Attraction Types

| Attraction Type | Number of Enterprises | Percent of Enterprises |
|---|---|---|
| On-farm retail market | 129 | 61.4 |
| On-farm tour | 92 | 43.8 |
| Pick-your-own farm | 53 | 25.2 |
| On-farm petting zoo | 39 | 18.6 |
| Pumpkin patches | 39 | 18.6 |
| Agriculture-related festival | 36 | 17.1 |
| "Century" farm | 24 | 11.4 |
| Agriculture-related fair | 23 | 11.0 |
| Corn maze | 22 | 10.5 |
| Cut-your-own Christmas trees | 20 | 9.5 |
| Farmers' market | 20 | 9.5 |
| Agriculture-related museum | 18 | 8.6 |
| On-farm bed and breakfast | 15 | 7.1 |
| Winery | 15 | 7.1 |
| On-farm vacation | 11 | 5.2 |
| On-farm fee-fishing | 8 | 3.8 |
| On-farm horseback riding | 8 | 3.8 |
| Other | 108 | 51.4 |

## Table 4: Percentage of Enterprises Reporting Attraction Types by Number of Attractions per Enterprise

| Attraction Types | Percent of Enterprises Reporting Number of Attractions | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | *Number of Attractions* | | | | | | | | |
| | ***1*** | ***2*** | ***3*** | ***4*** | ***5*** | ***6*** | ***7*** | ***8*** | ***9*** |
| Ag-related museum | 17 | 6 | 11 | 11 | 17 | 17 | 6 | 11 | 6 |
| Ag-related festival | 8 | 14 | 17 | 14 | 17 | 14 | 11 | 3 | 3 |
| Ag-related fair | 30 | 17 | 26 | 4 | 17 | 4 | 0 | 0 | 0 |
| Century farm | 0 | 4 | 17 | 25 | 17 | 4 | 13 | 13 | 8 |
| Corn maze | 0 | 0 | 9 | 18 | 14 | 18 | 23 | 9 | 9 |
| Cut-your-own Christmas tree | 5 | 35 | 25 | 25 | 0 | 0 | 5 | 5 | 0 |
| Farmers' market | 40 | 15 | 5 | 15 | 10 | 5 | 0 | 0 | 10 |
| On-farm tour | 2 | 3 | 28 | 29 | 10 | 12 | 8 | 5 | 2 |
| On-farm retail market | 2 | 21 | 28 | 22 | 9 | 9 | 5 | 4 | 1 |
| On-farm vacation | 0 | 0 | 18 | 36 | 9 | 18 | 0 | 18 | 0 |
| On-farm petting zoo | 0 | 8 | 18 | 10 | 23 | 8 | 15 | 13 | 5 |
| On-farm fee-fishing | 13 | 0 | 13 | 13 | 13 | 13 | 13 | 25 | 0 |
| On-farm horseback riding | 0 | 0 | 0 | 50 | 25 | 0 | 13 | 13 | 0 |
| On-farm bed and breakfast | 27 | 0 | 13 | 40 | 13 | 7 | 0 | 0 | 0 |
| Pick-your-own farm | 2 | 23 | 15 | 23 | 11 | 11 | 6 | 8 | 2 |
| Pumpkin patches | 0 | 5 | 23 | 18 | 18 | 10 | 13 | 8 | 5 |

## Table 5: Attraction Combinations with Positive Correlations

| Attraction Combination | Correlation Coefficient |
|---|---|
| Corn maze and pumpkin patch | 0.556* |
| Pick-your-own farm and pumpkin patch | 0.399** |
| On-farm retail market and pick-your-own farm | 0.393* |
| On-farm vacation and on-farm bed and breakfast | 0.35* |
| On-farm retail market and pumpkin patch | 0.303* |
| Corn maze and pick-your-own farm | 0.302* |
| On-farm vacation and on-farm horseback riding | 0.288* |
| On-farm tour and on-farm retail market | 0.286* |
| Corn maze and on-farm petting zoo | 0.276* |
| Corn maze and on-farm retail market | 0.239* |
| On-farm horseback riding and on-farm bed and breakfast | 0.235* |
| Ag-related fair and on-farm petting zoo | 0.225* |
| On-farm petting zoo and on-farm fee fishing | 0.225* |
| On-farm vacation and on-farm petting zoo | 0.217* |
| On-farm petting zoo and pumpkin patch | 0.181* |
| On-farm vacation and on-farm fee fishing | 0.177** |

**Table 5: Attraction Combinations with Positive Correlations (continued)**

| | |
|---|---|
| Century farm and on-farm petting zoo | 0.175** |
| Century farm and pumpkin patch | 0.175** |
| On-farm tour and on-farm horseback riding | 0.175** |
| Century farm and corn maze | 0.170** |
| On-farm tour and winery | 0.165** |
| On-farm petting zoo and on-farm horseback riding | 0.161** |
| Ag-related museum and century farm | 0.157** |
| On-farm tour and on-farm petting zoo | 0.146** |
| Corn maze and on-farm tour | 0.137** |

**Correlation coefficient significant at the 0.01 level.
*Correlation coefficient significant at the 0.05 level.

Correlation analysis also reveals that some attractions are unlikely to be offered in combination with other attractions by a single enterprise. Table 6 shows the correlation coefficient and related significance level for attraction combinations with significant, negative correlations. Perfect negative correlation, a correlation coefficient of -1, would occur if all enterprises with a specific attraction never offered a second specific attraction. None of the attraction combinations showed perfect negative correlation, and fewer combinations exist with any negative correlation than those combinations with positive correlation. “Agriculture-related fairs” and “on-farm retail markets” show the strongest negative correlation. The relationships weaken as the coefficient values increase toward zero.

**Table 6: Attraction Combinations with Negative Correlations**

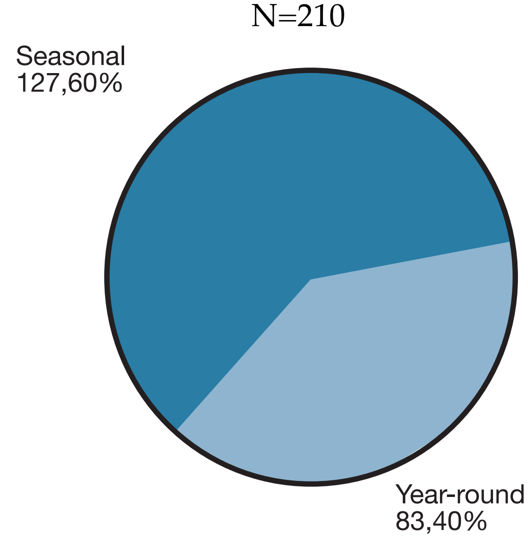
| Attraction Combination | Correlation Coefficient |
|---|---|
| Ag-related fair and on-farm retail market | -0.317* |
| Farmers’ market and on-farm retail market | -0.243* |
| Century farm and on-farm tour | -0.226* |
| Ag-related fair and on-farm tour | -0.217* |
| Ag-related festival and on-farm petting zoo | -0.205* |
| Ag-related fair and pick-your-own farm | -0.169** |
| Ag-related fair and pumpkin patch | -0.167** |
| On-farm bed and breakfast and pick-your-own farm | -0.161** |
| On-farm retail market and on-farm bed and breakfast | -0.160** |
| Ag-related festival and on-farm retail market | -0.159** |
| Cut-your-own Christmas tree and pick-your-own farm | -0.151** |
| Ag-related festival and cut-your-own Christmas tree | -0.148** |

**Correlation coefficient significant at the 0.01 level.
*Correlation coefficient significant at the 0.05 level.

## *Enterprise Operation Schedule*

Agritourism enterprises may be open seasonally or year-round. As shown in Figure 3, 127 enterprises (60 percent) are seasonal, while the remaining 83 enterprises (40 percent) are open year-round.

**Figure 3: Enterprise Operation Schedule**




## *Years of Experience*

Respondents were asked to provide the number of years they had operated an agritourism enterprise. The 203 responses ranged from less than one year to 78 years of experience. The median[3] response was 10 years of experience. Nine respondents had operated an agritourism enterprise for less than one year. Almost 30 percent of respondents had five years or less experience, and approximately 70 percent of respondents had 15 years of experience or less in operating an agritourism enterprise. Table 7 shows the years of experience by number of respondents.

**Table 7: Number of Respondents and Years of Experience**

| Years of Experience | Number of Respondents | Percent |
|---|---|---|
| Less than 1 | 9 | 4.4 |
| 1-5 | 52 | 25.6 |
| 6-10 | 44 | 21.7 |
| 11-15 | 43 | 21.2 |
| 16-20 | 19 | 9.4 |
| 21-25 | 18 | 8.9 |
| 26-40 | 14 | 6.9 |
| 41-78 | 4 | 2.0 |
| *Total* | *203* | *100.0* |

## *Employment*

Agritourism operations support a significant number of jobs. Table 8 summarizes the number of enterprises reporting one or more employees per employee classification, the median number of employees per enterprise classification, the average number of employees per employee classification and the range of responses. The four employee classifications are: full-time year-round, part-time year-round, full-time seasonal and part-time seasonal.

[3] "Median" refers to the value where roughly half of the responses are smaller in value and half of the responses are larger in value.

One hundred thirty-three enterprises reported having one or more full-time year-round employee(s). The median number of full-time year-round employees per enterprise was two, and the average number of full-time year-round employees per enterprise was 4.14. The number of full-time year-round employees per enterprise ranged from one to 40.

The greatest number of employees for a single enterprise was 200 reported in the full-time seasonal classification. While the average number of full-time seasonal employees was 7.85 per enterprise, the mean number of employees for this classification was three.

The median number of full-time year-round and part-time seasonal employees per enterprise was two, while the median number of part-time year-round and full-time seasonal employees was three. The average number of employees per enterprise was greater than the median number of employees per enterprise for each classification. The differences in median and average responses in each classification indicate the distribution of responses is skewed such that a low number of enterprises with a high number of employees inflate the average.

In addition to reporting the number of employees, 14 enterprises indicated volunteers worked at their agritourism enterprises; two enterprises reported being staffed with volunteers only. Other enterprises reported between eight and 150 volunteers.

**Table 8: Number of Employees by Classification**

| Employee Classification | Number of Enterprises with One or More Employees | Median Number of Employees | Average Number of Employees | Range |
|---|---|---|---|---|
| Full-time year-round | 133 | 2 | 4.14 | 1 – 40 |
| Part-time year-round | 62 | 3 | 4.69 | 1 – 20 |
| Full-time seasonal | 66 | 3 | 7.85 | 1 – 200 |
| Part-time seasonal | 95 | 2 | 7.47 | 1 – 150 |

## *Number of Customers*

The survey asked respondents to estimate the number of customers who visited their enterprise in 2002. The number of visitors reported ranged from 0 to 425,000 for 154 enterprises, while 52 enterprises did not make an estimate of how many visitors they had in 2002. Respondents accounted for a total of more than 3.5 million visitors in 2002, with an average of 22,944 visitors per enterprise. The median number of visitors reported was 3,500. The large difference in the average and median number of visitors per enterprise indicates that a majority of enterprises had visitors numbering in the lower range of responses. Figure 3 segments the number of enterprises into categories based on the number of visitors reported. Six enterprises did not have any visitors in 2002, most likely indicating they were not in business in 2002. A quarter of enterprises, 52, had 1,000 or fewer visitors in 2002. Thirty-three enterprises had between 1,200 and 5,000 visitors. Less than a quarter of enterprises had between 5,500 and 50,000 visitors. Enterprises with 65,000 or more visitors numbered 14.

Enterprises open seasonally versus year-round reported a significant difference in the average number of visitors. Year-round operations had 84,000 visitors on average in 2002, compared to an average of 13,500 visitors for seasonal enterprises. This trend did not hold for the 52 enterprises with 1,000 or less visitors for 2002. No significant difference exists in the average number of visitors in 2002 between seasonal and year-round operations for enterprises with 1,000 or less visitors.

Respondents were asked which percentage of their visitors in 2002 could be described as one-time versus repeat visitors. Half of visitors (median = 50 percent) were reported as being one-time visitors to enterprises. Figure 5 shows the median portion of one-time and repeat visitors.

One-time visitors are valuable to the agritourism industry as the percentage of one-time visitors may indicate growth in the industry as people visit an agritourism enterprise for the first time. The test then becomes if those one-time visitors become repeat visitors. Repeat visitors are the "bread and butter" of the enterprise and industry as some loyalty to enterprises is built, and direct marketing at the enterprise level has the potential to be more effective.

**Figure 4: Number of Enterprises by Estimated Number of Visitors in 2002**

N=206

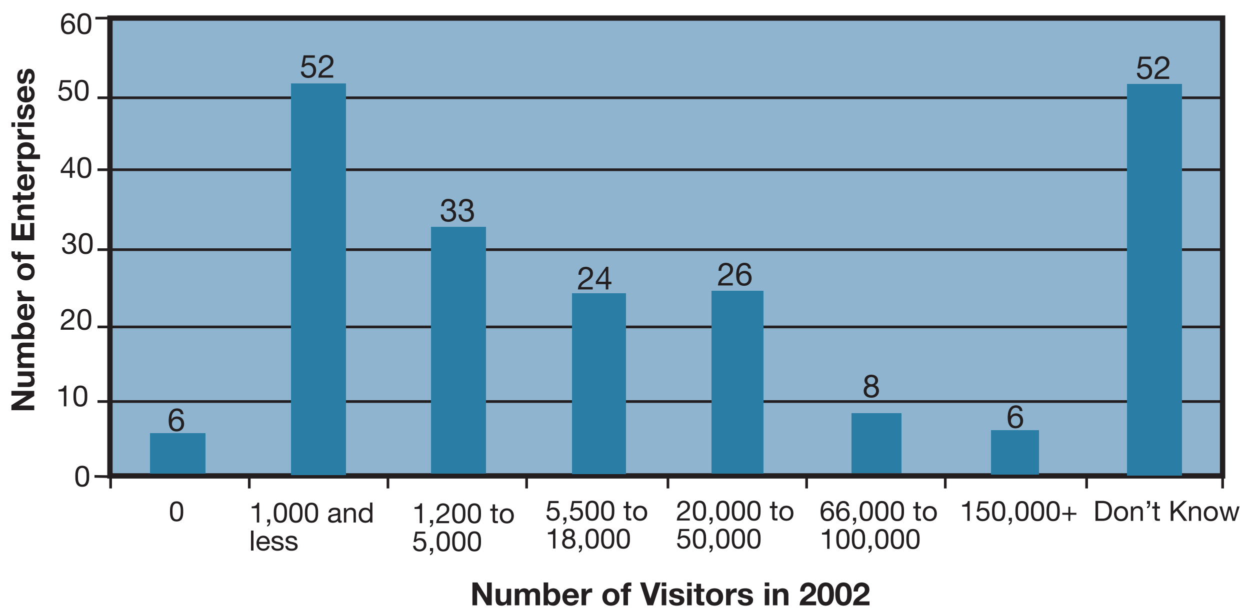
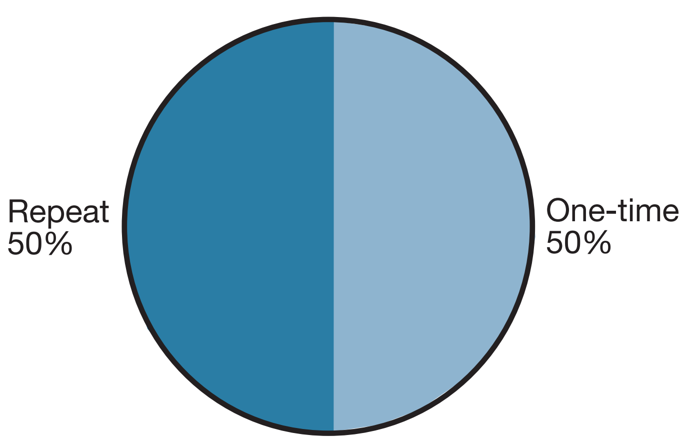



**Figure 5: Median Portion of One-time and Repeat Visitors**

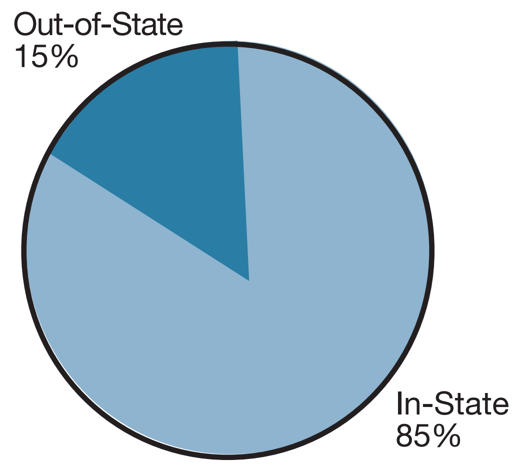
N=147



Respondents reported 85 percent (median) of total visitors were from in-state. Figure 6 illustrates the median portion of visitors from in- and out-of-state. This information is valuable in narrowing the target market to which promotional strategies are planned and directed for the initiative. Individual enterprises should consider their specific customer profile and target market.

**Figure 6: Median Portion of Visitors from In- and Out-of-State**

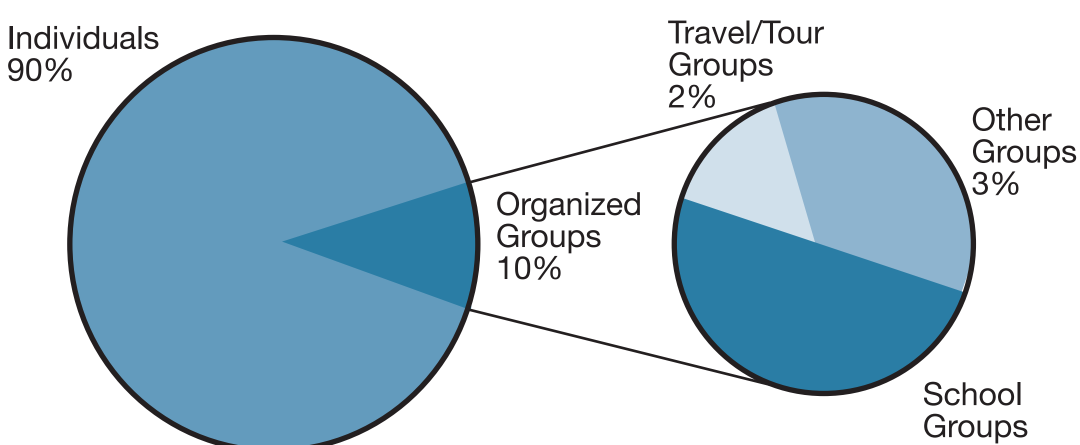
N=163




Ten percent of total visitors (median) in 2002 were part of organized group visits. Half of the visitors in groups were part of school groups. Another 15 percent of visitors in groups were part of travel or tour groups. A breakdown of visitors by individuals and groups is shown in Figure 7.

**Figure 7: Median Portion of Visitors in Organized Groups and Type of Group**

N=147

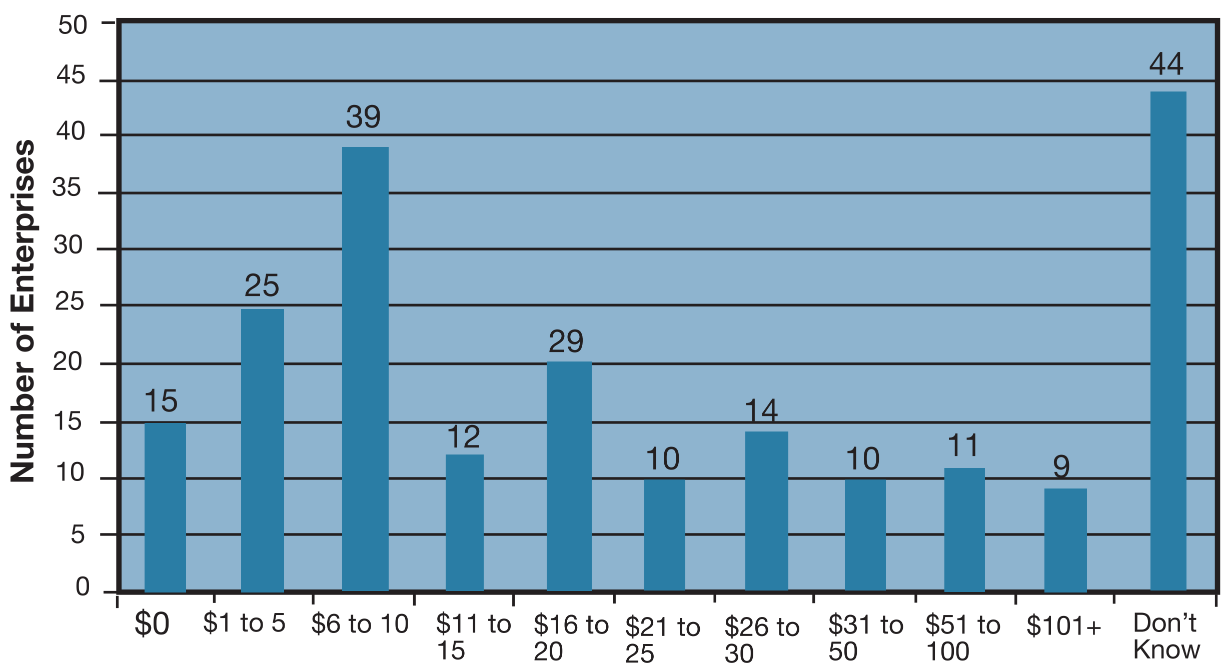


## Dollars Spent per Visitor

The average dollar amount spent per visitor is a basic evaluation benchmark that can be used by enterprises to evaluate sales progress and success. Survey participants were asked to report the average amount each customer spent at their operation per visit in 2002. Responses ranged from $0 to $400 by 165 respondents, and 44 did not know how much customers spent on average. The average amount spent per visit in 2002 was $28.46, although the median was $15, indicating more enterprises had average per-customer sales on the lower end of the range than on the higher end. Fifteen enterprises reported customers on average spent nothing at their enterprise in 2002. Approximately 30 percent of respondents reported average dollars spent by customers between $1 and $10. Another 15 percent of enterprises reported sales of $11 to $20 per customer, on average. Figure 8 shows the number of enterprises that reported earning average sales per customer in 2002 by sales level category.

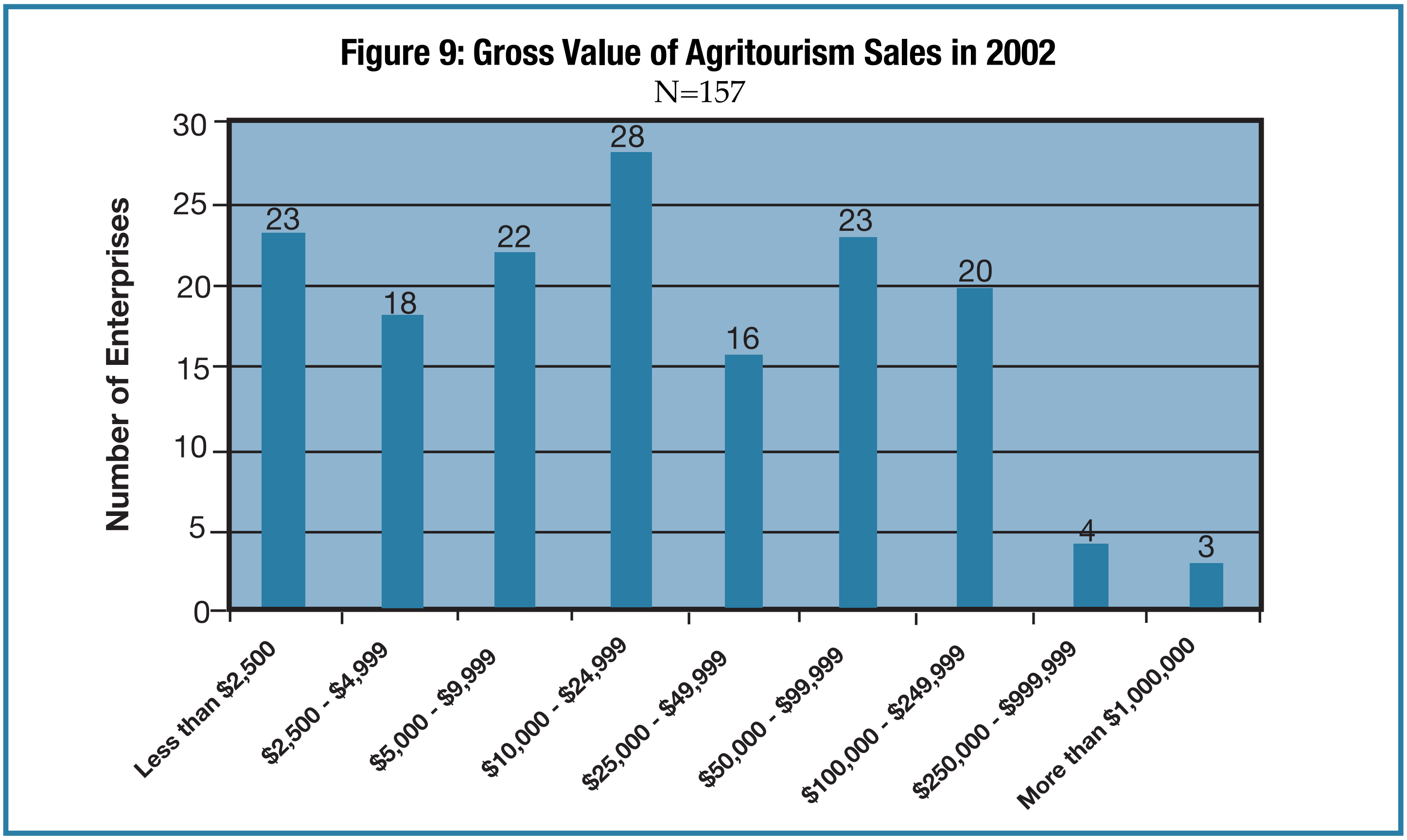
**Figure 8: Number of Enterprises by Average Dollars Spent per Visit by Visitors in 2002**

N=209




## Gross Value of Sales

When given a list of nine different gross sales categories, respondents were asked to identify the category that best describes the annual gross value of agritourism sales for their enterprise in 2002. Of the 157 respondents, 28 reported gross sales between $10,000 and $24,999. Twenty-three respondents indicated gross sales of between $50,000 and $99,999, while another 23 respondents reported sales of less than $2,500. Four respondents identified gross sales of $250,000 to $999,999, and more than $1 million in sales was reported by three enterprises. Figure 9 shows the number of enterprises reporting in each agritourism sales category.




Gross value of sales is significantly different for enterprises that are open year-round compared to those open on a seasonal basis. Table 9 shows the number of year-round and seasonal enterprises reporting gross sales by category. As the income category increases, a higher number of enterprises are open year-round.

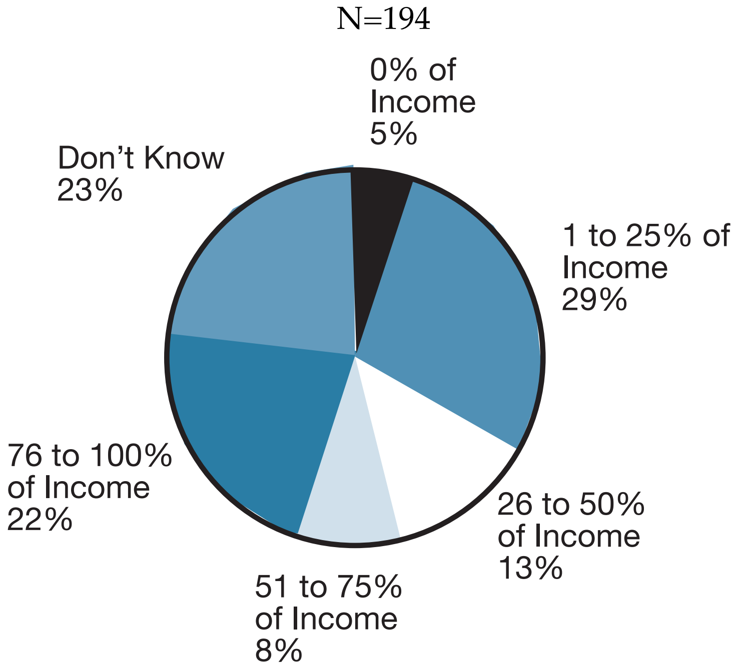
**Table 9: Year-round and Seasonal Enterprises by Gross Sales Category**

| | Year-round | | Seasonal | | Total | |
|---|---|---|---|---|---|---|
| | Number of Enterprises | Percent | Number of Enterprises | Percent | Number of Enterprises | Percent |
| Less than $2,500 | 7 | 11.5 | 15 | 16.0 | 22 | 14.2 |
| $2,500 - $4,999 | 3 | 4.9 | 14 | 14.9 | 17 | 11.0 |
| $5,000 - $9,999 | 3 | 4.9 | 19 | 20.2 | 22 | 14.2 |
| $10,000 - $24,999 | 9 | 14.8 | 19 | 20.2 | 28 | 18.1 |
| $25,000 - $49,999 | 5 | 8.2 | 11 | 11.7 | 16 | 10.3 |
| $50,000 - $99,999 | 13 | 21.3 | 10 | 10.6 | 23 | 14.8 |
| $100,000 - $249,999 | 14 | 23.0 | 6 | 6.4 | 20 | 12.9 |
| $250,000 - $999,999 | 4 | 6.6 | 0 | 0.0 | 4 | 2.6 |
| More than $1,000,000 | 3 | 4.9 | 0 | 0.0 | 3 | 1.9 |
| Total | 61 | 100.0 | 94 | 100.0 | 155 | 100.0 |

## *Agritourism Sales as Percent of Gross Sales from Agriculture*

An agritourism enterprise may be only one component of a diversified agricultural operation. Survey respondents were asked what percentage of their annual gross income from agriculture in 2002 was attributed to agritourism. Responses from 150 respondents ranged from 0 (5 percent of responses) to 100 (19 percent of responses). Another 44 enterprises did not know. Twenty-nine percent of enterprises reported agritourism sales as a percent of total sales from agriculture between 1 and 25. The average percentage of annual gross income from agriculture attributed to agritourism was 47 percent. The percentage of enterprises reporting sales as a percent of total agriculture sales is shown in Figure 10.

**Figure 10: Percent of Agritourism Enterprises Generating Certain Portions of Agricultural Income from Agritourism**




Thirty-five enterprises reported 100 percent of their agricultural sales came from agritourism. It is interesting to consider whether enterprises with certain attractions are more likely to fall into this category than enterprises with other attractions. Table 10 shows an analysis of enterprises reporting 100 percent of agricultural sales from agritourism by attraction type. Overall, the attraction with the highest number of enterprises with 100 percent of agricultural sales from agritourism was the "on-farm retail market," but this may be misleading, as more enterprises offer "on-farm retail markets" than any other attraction. Therefore, it may be more logical to consider the percentage of enterprises offering each attraction that report 100 percent of agricultural sales from agritourism. Nineteen percent of enterprises offering an "on-farm retail market" report 100 percent of agricultural sales from agritourism, while half of the enterprises that offer a "cut-your-own Christmas tree" attraction reported 100 percent of agricultural sales came from agritourism. Forty percent of enterprises with "on-farm bed and breakfast" attractions and a third of "wineries" also fit in this category. On the other end, no enterprises offering "on-farm fee-fishing" reported all of their sales from agritourism. Interestingly, only one of 20 enterprises with a "farmers' market" claimed all sales from agritourism.

## Table 10: Enterprises Reporting 100 Percent of Agricultural Sales from Agritourism by Attraction Type

| Attraction Type | Number of Enterprises Reporting 100% Ag Sales from Agritourism | Total Number of Enterprises by Attraction Type | % with 100% Sales |
|---|---|---|---|
| Cut-your-own Christmas tree | 10 | 20 | 50% |
| On-farm bed and breakfast | 6 | 15 | 40% |
| Winery | 5 | 15 | 33% |
| On-farm vacation | 3 | 11 | 27% |
| On-farm horseback riding | 2 | 8 | 25% |
| Ag-related museum | 4 | 18 | 22% |
| On-farm retail market | 25 | 129 | 19% |
| Ag-related festival | 6 | 36 | 17% |
| Century farm | 4 | 24 | 17% |
| On-farm tour | 15 | 92 | 16% |
| Pumpkin patches | 6 | 39 | 15% |
| Corn maze | 3 | 22 | 14% |
| Pick-your-own farm | 7 | 53 | 13% |
| On-farm petting zoo | 4 | 39 | 10% |
| Ag-related fair | 2 | 23 | 9% |
| Farmers' market | 1 | 20 | 5% |
| On-farm fee-fishing | 0 | 8 | 0% |
| *Total* | *35* | --- | --- |

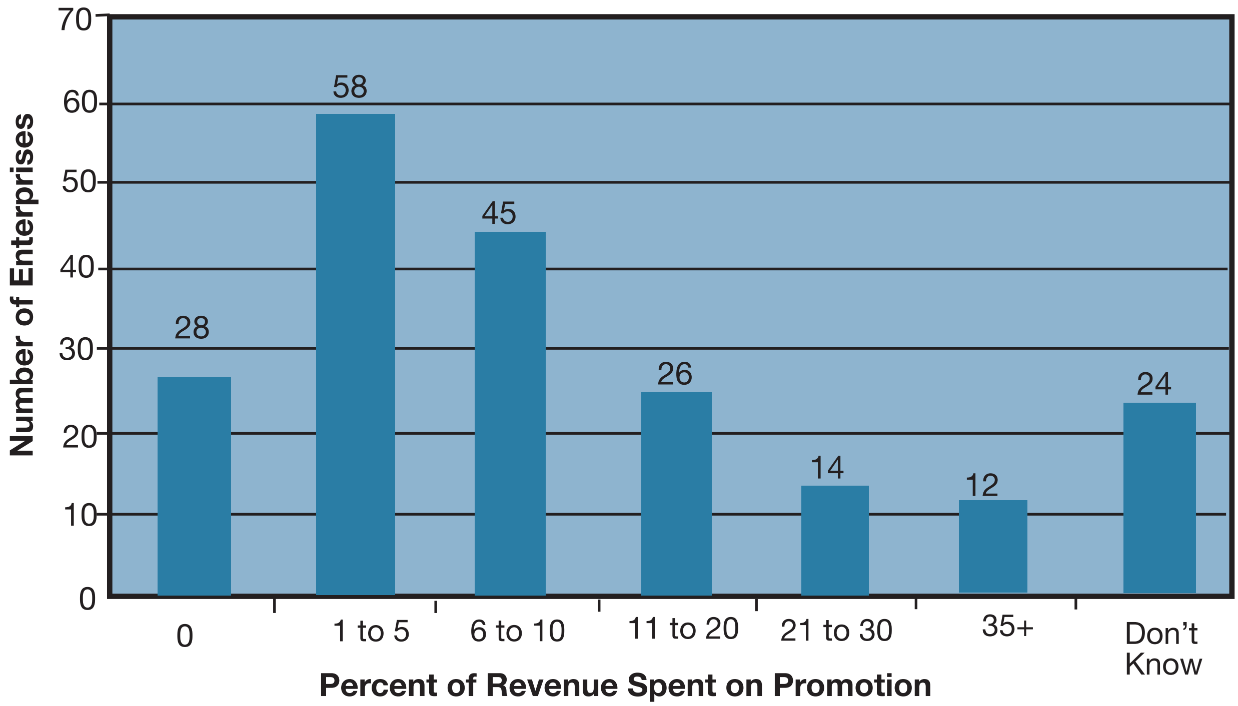
## *Promotional Budget*

Respondents were asked what portion of their agritourism revenue they spend on promotional activities. Figure 11 shows the number of enterprises that spend a given percent of revenue on promotions. Responses ranged from 0 to 100 percent, and the 183 respondents spent an average of 12 percent of revenue on promotions.

Fifteen percent of respondents said they spent nothing on promotions. The largest number of respondents, 58, reported promotional budgets between 1 and 5 percent of revenue. Almost half of respondents spent 10 percent or less of sales on promotions. Six percent of respondents spent 35 percent or more of sales on promotional activities.

**Figure 11: Number of Enterprises That Spend Given Percent of Revenue on Promotion**

N=207

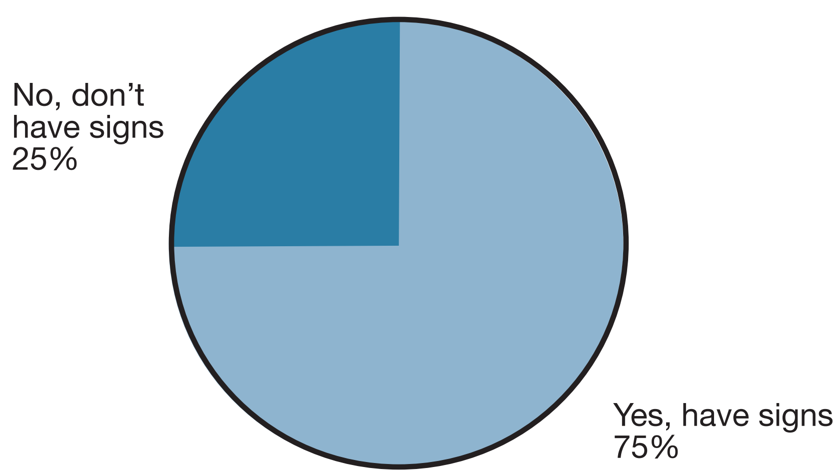



## *Signage*

Signage is an important tool in promoting an enterprise and directing customers to an operation. Almost 75 percent of enterprises have an average of 4.5 signs on public roadways. Number of signs per enterprise ranged from one to 30. Fifty-three enterprises do not have signs on public roadways. Figure 12 illustrates the number of enterprises with roadside signs.

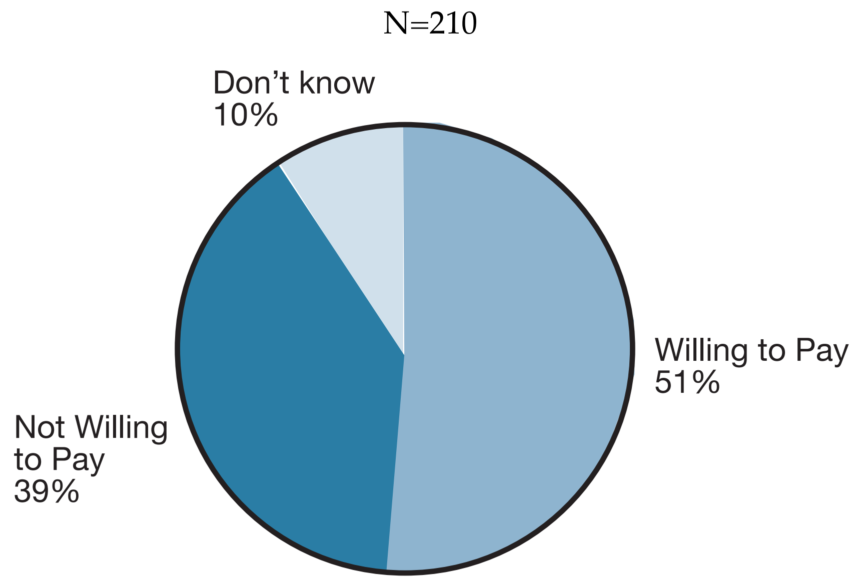
**Figure 12: Enterprises with Roadside Signage**

N=210



When asked if they were willing to pay a one-time fee of $200 with an annual fee of $50 per sign to the Tennessee Department of Transportation to erect a sign with the business name, direction arrow and distance to the operation from a state highway, 51 percent responded favorably. Thirty-nine percent were not willing to pay for this sign program and the remaining 10 percent were unsure. More than a quarter of respondents (n=22) who were unwilling to pay for signs indicated they already had signs, and 20 percent (n=17) claimed they did not need signs. Thirteen percent of respondents (n=11) reasoned they were only open for a short time period, and 12 percent (n=10) indicated that the fee was too high. Responses are summarized in Figure 13.

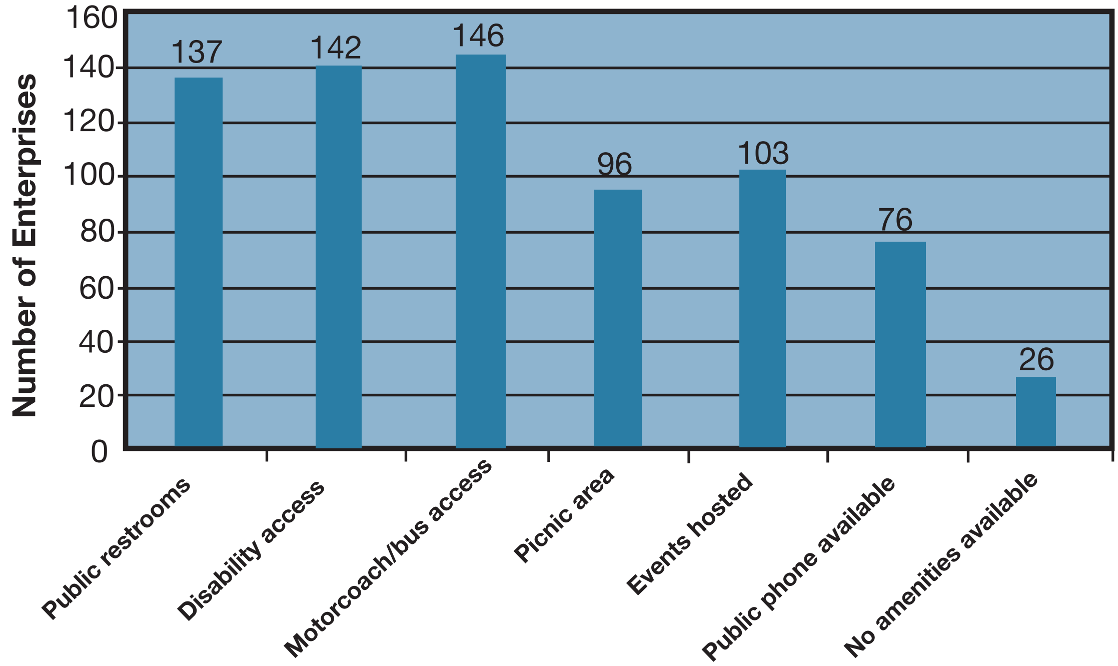
**Figure 13: Enterprises Willing to Pay for Signage**




## *Amenities*

Amenities offered by agritourism enterprises may attract certain customer segments or affect the operation's eligibility for some signage programs. Survey respondents were asked if their enterprise offered a specific list of amenities. Motor coach accessibility is offered at 146 of the enterprises. Public restrooms are available at 137 enterprises, and public phones are available at 76. Disability access is available at 142 enterprises. One hundred three enterprises host events, and 96 offer a picnic area. The number of enterprises offering each amenity is shown in Figure 14.

Figure 14: Number of Enterprises with Amenities




## *Internet Use*

Web sites and e-mail can be effective promotional and communication tools for agritourism enterprises. Survey participants were asked if they had Web sites and e-mail addresses for their operations. Less than half (46 percent) of the 210 enterprises have Web sites, and 62 percent have e-mail addresses. Figures 15 and 16 illustrate the portion of enterprises with Web sites and e-mail addresses.

Figure 15: Percent of Enterprises with Web Sites

N=210

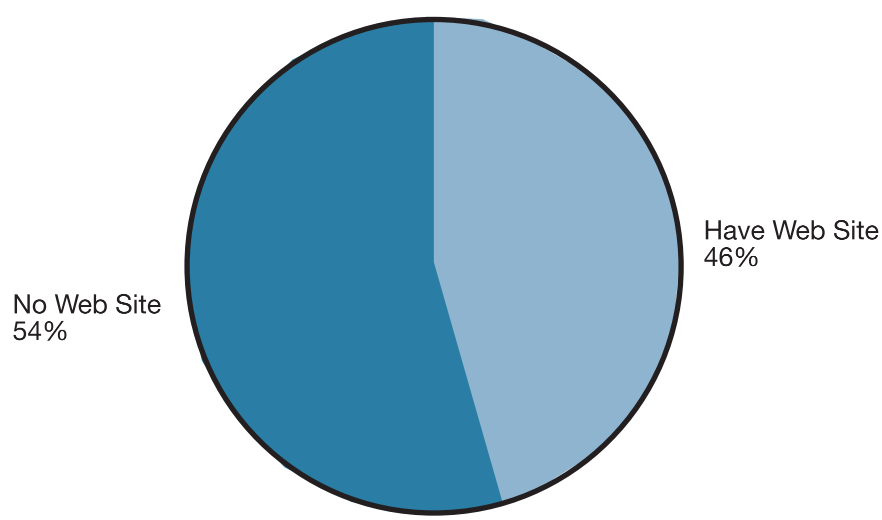
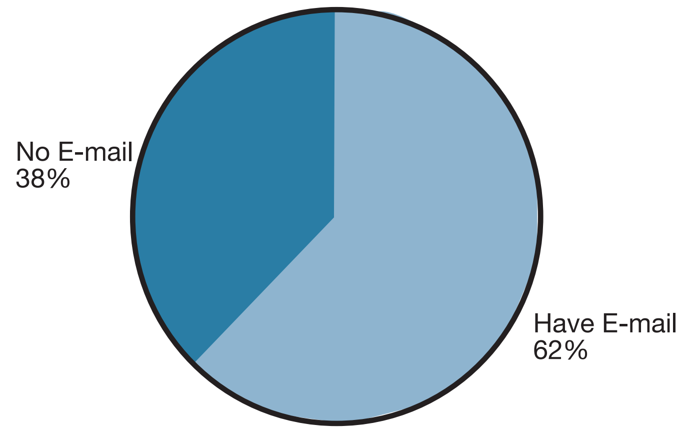


**Figure 16: Percent of Enterprises with E-mail Addresses**

N=210

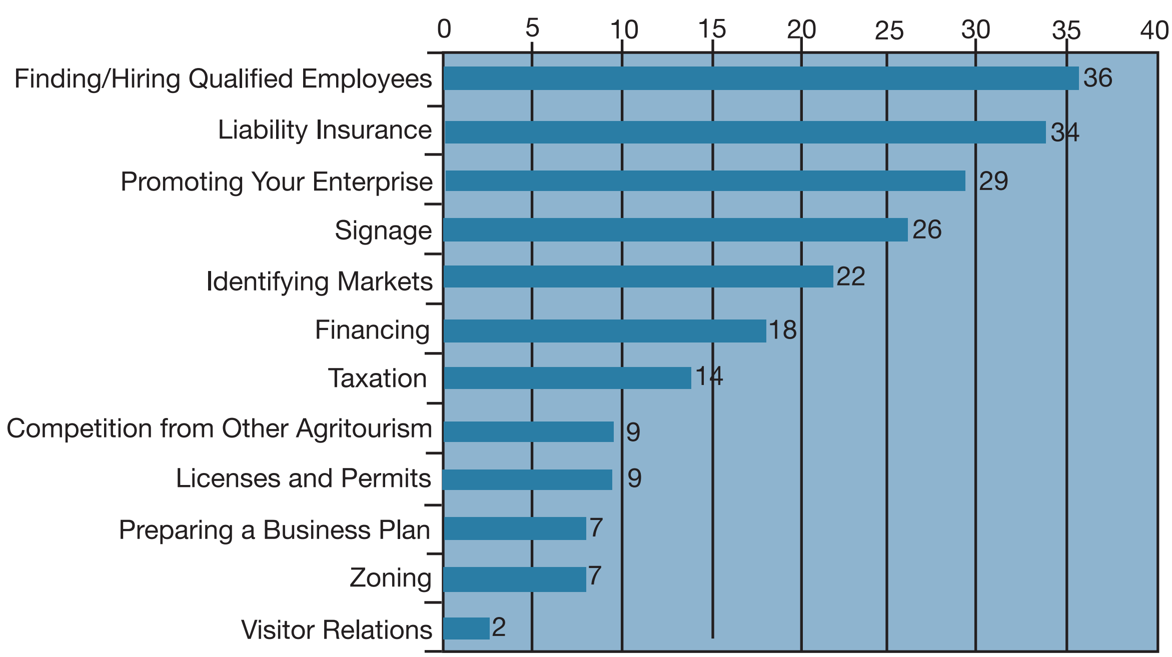



## *Issues Faced*

Agritourism entrepreneurs face many issues in the start-up and continual operation of their enterprises. Survey respondents were asked to indicate how much difficulty a variety of issues had been in the development of their agritourism enterprises. The level of difficulty was expressed on a scale of 1 to 3, where the higher the ranking the greater the level of difficulty. A ranking of 1 corresponded to having "no difficulty," a ranking of 2 corresponded to having "some difficulty" and a ranking of 3 corresponded to being a "major obstacle."

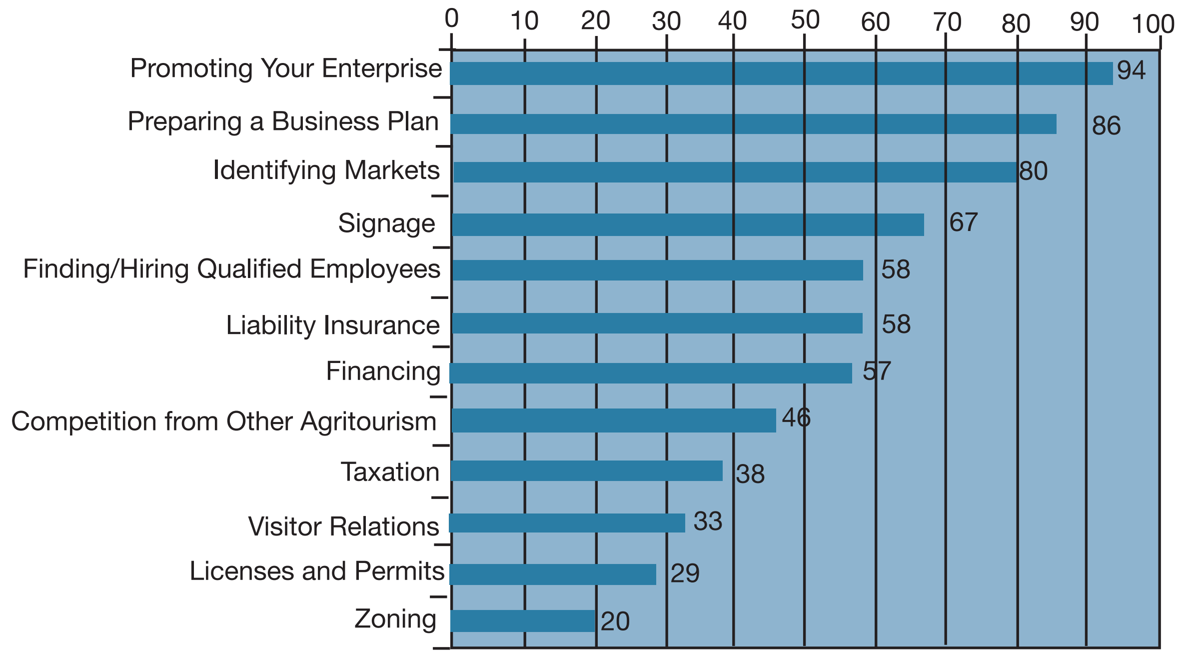
"Finding and hiring qualified employees" received the most 3 rankings with 36. The "liability insurance" issue, however, followed closely with 34. "Promoting the enterprise," "signage" and "identifying markets" were described as being "major obstacles" by 29, 26 and 22 respondents, respectively. While all issues received at least some rankings as a "major obstacle," "visitor relations" was only a concern for two respondents.

**Figure 17: Number of Respondents Ranking Issue as a 3 ="Major Obstacle"**



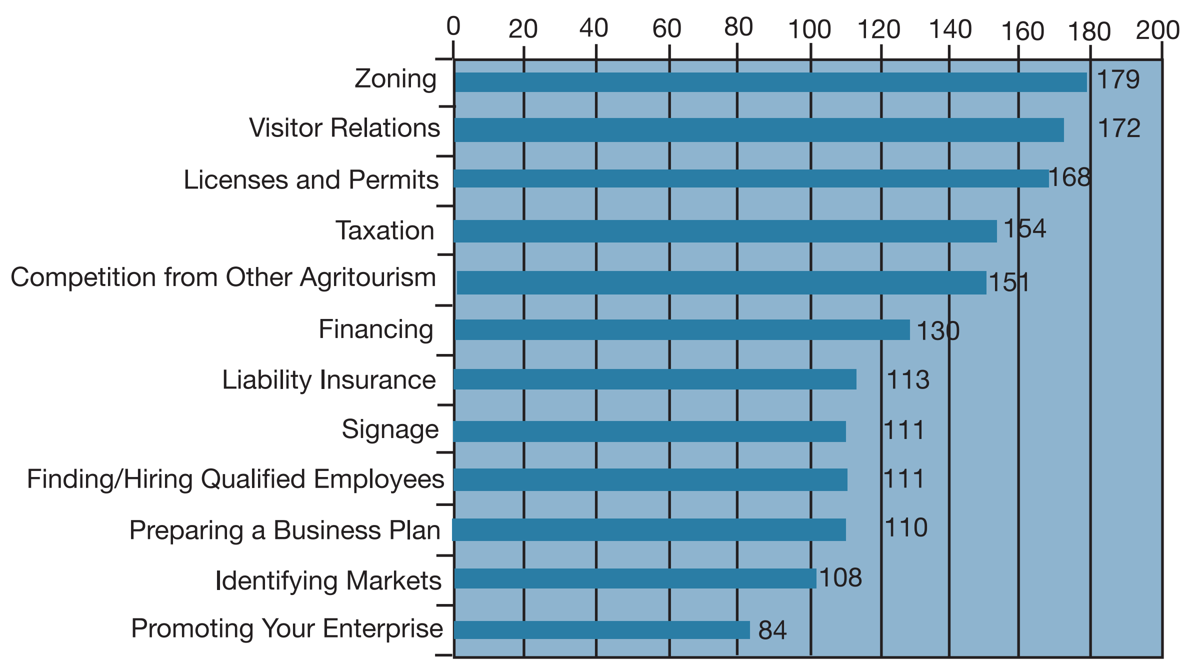
Ninety-four respondents indicated that “promoting their enterprise” presented “some difficulty” and received a ranking of 2. “Preparing a business plan” and “identifying markets” received a ranking of 2 by 86 and 80 respondents, respectively. “Signage” was an issue that presented “some difficulty” to 67 enterprises, while “finding and hiring qualified employees” and “liability insurance” were ranked in this category by 58 enterprises. “Zoning” received the lowest number of 2 rankings with 20.

**Figure 18: Number of Respondents Ranking Issue as a 2 =“Some Difficulty”**



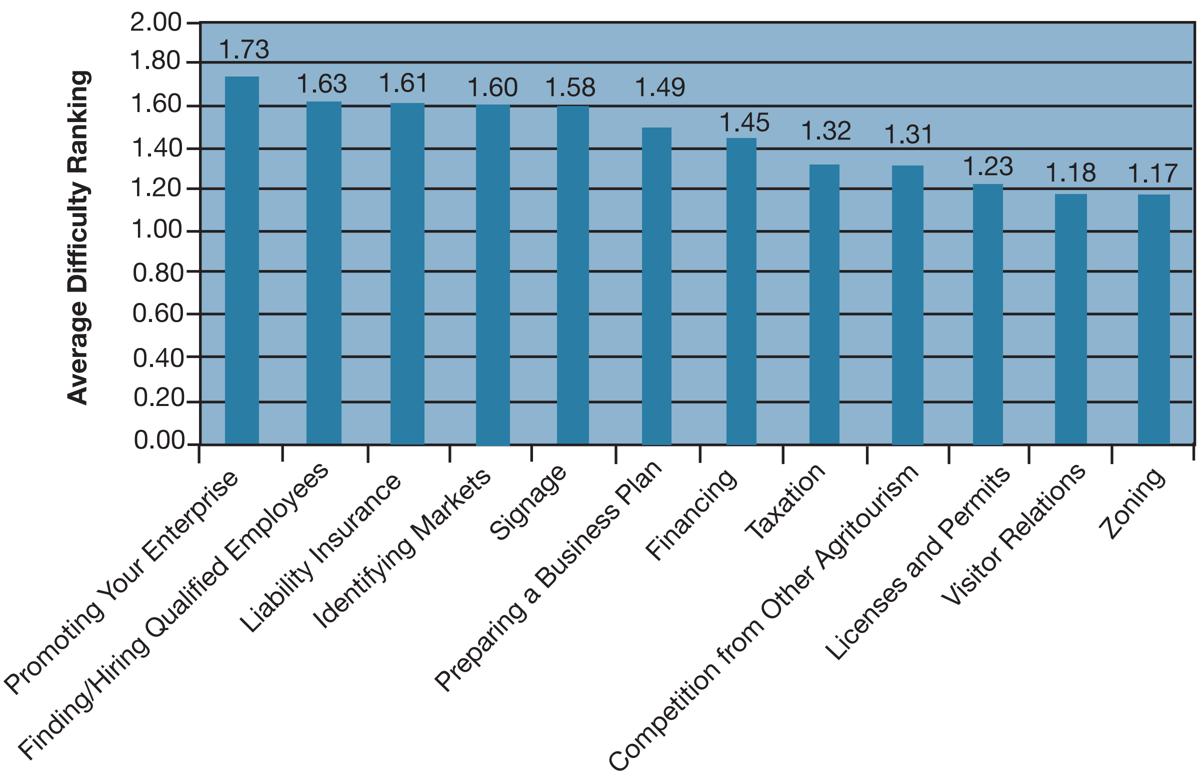

A relatively large number of respondents had “no difficulty” with each of the issues. “Zoning” received the highest number of 1 rankings with 179. “Visitor relations” and “licenses and permits” followed closely with 172 and 168, respectively. The issue of “promoting the enterprise” received the fewest 1 rankings with 84.

**Figure 19: Number of Respondents Ranking Issue as a 1 =“No Difficulty”**



Average rankings can be used to summarize the overall difficulty of the issue. The average response for each issue is shown in Figure 20. Overall, the issues do not appear to be posing major difficulty to entrepreneurs as the average ranged from 1.17 to 1.73, between "no difficulty" and "some difficulty." The issues described as "promoting your enterprise" and "finding and hiring qualified employees" received the highest difficulty rankings on average. "Liability insurance," "identifying markets," "signage," "preparing a business plan" and 'financing" all followed closely. "Taxation" and "competition from other agritourism enterprises," on average, were ranked more difficult than the issues of "licenses and permits," "zoning" and "visitor relations."

**Figure 20: Average Difficulty Ranking of Issues Faced**




## *Factors of Success*

"Advertising," "marketing" and "promotions" were identified as the most important factors of success for agritourism enterprises according to 22.4 percent of the entrepreneurs interviewed. "Location" was identified by 6.6 percent and "customer relations/satisfaction" was identified by 6 percent as being important factors of success.

## *Services Needed*

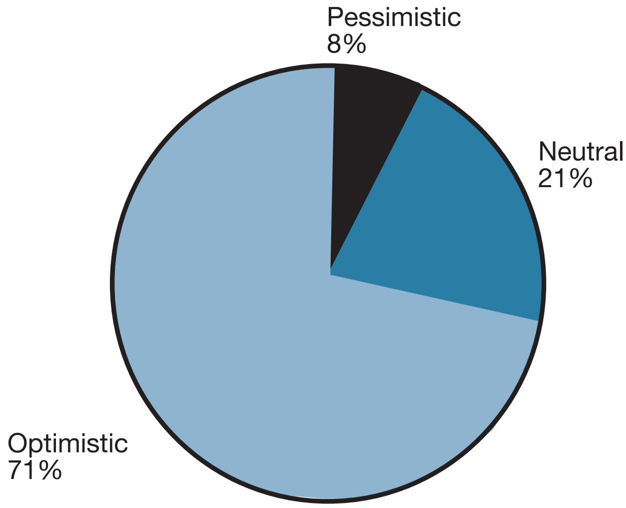
Similar to the factors of success, "advertising," "marketing" and "promotions" were identified as the most-needed services that were not currently available. Approximately one-third of the 139 comments made on services needed dealt with promotion, advertising and marketing. An additional 10.8 percent of the respondents felt "money and funding" was a service that was not currently available.

## *Future Outlook*

Approximately 71 percent of survey respondents said they are “optimistic” about the future success of the agritourism industry in Tennessee. An additional 20 percent, 44 respondents, were “neutral,” and just less than 8 percent, 16 respondents, were “pessimistic” about the future of the industry. The future outlook of enterprise operators is summarized in Figure 21.

**Figure 21: Opinion of Future Outlook**

N=210

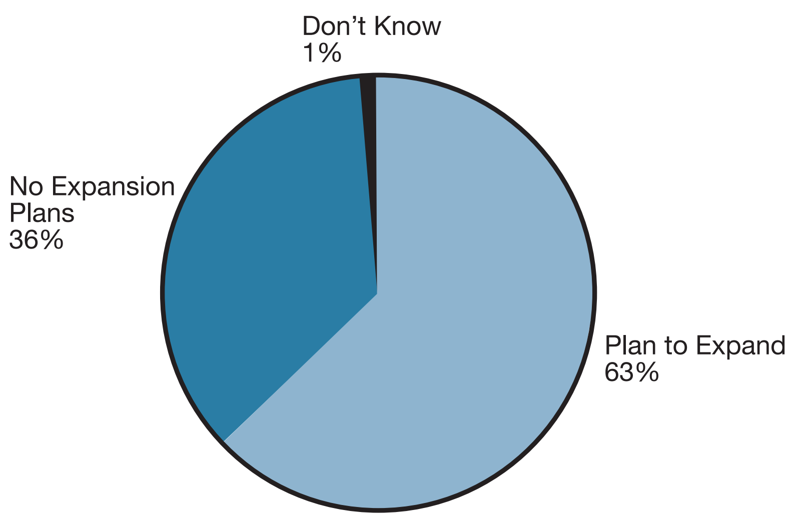



## *Expansion Plans*

Survey respondents were asked if they planned to expand their agritourism enterprise in the next three years, and 131 operators, approximately 63 percent, replied in the affirmative. Seventy-six respondents did not have expansion plans, and three were unsure as to their future expansion plans. Responses are summarized in Figure 22.

**Figure 22: Enterprises with Expansion Plans**

N=210



# Summary and Implications

A total of 210 existing enterprises were identified and successfully contacted to participate in the inventory survey, although attempts to reach 239 suspected agritourism operations were unsuccessful.

A portion of the information collected during the survey was used to promote the participating enterprises. Enterprise information was listed on the Department of Agriculture's Pick Tennessee Products Web site at www.picktnproducts.org with links to the Department of Tourist Development's Web site at www.tnvacation.com/agritourism.

Additional information learned from the inventory was helpful in creating a profile of Tennessee's agritourism industry. Enterprises participating in the inventory were located in 75 of Tennessee's 95 counties. The number of enterprises per county ranged from one to eight. Approximately 80 percent of enterprises offer visitors more than one attraction, and 60 percent of enterprises are open only seasonally. Agritourism enterprise operators have a median value of 10 years of experience in their industry. The operators identified "advertising," "marketing" and "promotions" as the most important factors of success for their enterprises.

Agritourism has a significant impact on Tennessee's economy. Respondents accounted for approximately 3.5 million visitors in 2002. Customers spent up to $400 per visit at agritourism enterprises in 2002, with 30 percent of enterprises earning between $1 and $10 per visitor. Annual gross sales for enterprises in 2002 ranged from $0 to more than $1 million. Enterprises accounted for a significant number of full and part-time jobs both year-round and seasonally. Approximately 63 percent of respondents had plans to expand their operation in the next three years.

Additional information was also learned about typical agritourism enterprise customers. Survey respondents reported 85 percent (median) of total visitors to their enterprises were from in-state. Promotional efforts for general industry promotions should be focused on the in-state audience. Individual enterprises should consider their specific target market, however, in developing their marketing plan.

Respondents were asked which percentage of their visitors were one-time visitors versus repeat visitors. Half of visitors (median = 50 percent) were reported as being one-time visitors to enterprises. One-time visitors are valuable to the agritourism industry, as the percentage of one-time visitors may indicate growth in the industry. The test then becomes if those one-time visitors become repeat visitors. Repeat visitors are the "bread and butter" of the enterprise and industry as some loyalty to enterprises is built and direct marketing at the enterprise level has the potential to be more effective.

Ten percent of total visitors (median) in 2002 were part of organized group visits. Half of the visitors in groups were part of school groups, and another 15 percent of visitors in groups were part of travel or tour groups.

The inventory provided information on the issues and obstacles faced by agritourism operators and identified topics in need of research, education and outreach. Survey respondents reported they have the most difficulty on average in "promoting their enterprises" and "finding and hiring qualified employees." They experience "some difficulty" with "liability insurance," "identifying markets," "signage," "preparing business plans" and "financing" issues. Approximately one-third of enterprise operators identified "advertising," "marketing" and "promotions" issues as being an area where service is needed. Approximately 11 percent of respondents reported that "money and funding" was needed. The relatively large number of respondents who did not know answers to several key benchmark evaluation measures indicates a need for education and outreach.

The inventory and assessment of existing agritourism enterprises was successful in gaining information valuable to assist the Tennessee Agritourism Initiative partners in their efforts to build farm income through agritourism, expand tourism income within rural communities and establish a sustainable, long-term program. Information learned in the inventory was used to promote participating enterprises, create a profile of the Tennessee agritourism industry and identify areas where research, education and outreach are needed.

# Appendix

## *Telephone Questionnaire Script*

### *Section I*

I am calling on behalf of the University of Tennessee and the Tennessee Department of Agriculture in an effort to conduct an inventory of agri-tourism attractions and enterprises. You were identified as being involved in the agri-tourism industry.

1) Are you an owner or operator of an agri-tourism attraction?
If YES➔<Continue to Q2>

If correct person not available➔schedule callback

If NO➔ Are you associated with or is there any one is your family involved in agri-tourism attractions or enterprises? By agri-tourism we mean an activity, enterprise or business which combines primary elements and characteristics of Tennessee agriculture and tourism and provides an experience for visitors that stimulates economic activity and impacts both farm and community income.

If NO➔Thank you for your time. <End call>

2) Are you 18 years old or older?

If NO➔Is there someone 18 years of age or older that I can speak with?
If YES➔<Continue>

We are collecting information about enterprises to be included in promotional activities for the agri-tourism industry, such as a searchable Web site and printed brochures. We would like to consider including your enterprise in various promotional activities developed by the Tennessee Department of Tourism. To be considered for inclusion, we will need to collect some specific information about your operation. Your participation is voluntary, and you may decline to participate or withdraw your participation at any time.

3) Would you like to participate and be considered for inclusion in the promotional efforts?
YES➔<Continue with next Question.>
NO➔<Skip to Section III.>

4) Attractions will be listed for promotions under different headings according to the type of activities provided. Which of the following classification or classifications describe(s) your operation?

___Agricultural-related museum
___Agricultural-related festival
___Agricultural-related fair
___"Century" farm
___Corn maze
___Cut-your-own Christmas trees
___Farmers' market
___On-farm tour
___On-farm retail market
___On-farm vacation
___On-farm petting zoo
___On-farm fee-fishing
___On-farm horseback riding
___On-farm bed and breakfast
___Pick-your-own farm
___Pumpkin patches
___Winery
___Other (Please specify.)

____________

## *Section II*

In order to include you in these promotions, we need to collect some important information about your attraction.

5) What is the name of your agri-tourism enterprise? <If have enterprises with different names and services, complete separate surveys for each.>

6) Who do you want to be listed as the contact person for the business? (List up to 2 names.)

7) What is the phone number that you would like listed?

8) What is the address of the business? (street address and mailing address if different, city, state, Zip code)

9) In which county is the business located?

10) Do you have a Web site address for the business? If yes, what is the address?

11) Does the business have an e-mail address? If yes, what is the address?

12) Are you open year-round or seasonally?
<If year-round, skip to Q14.>
<If seasonally, continue with Q13.>

13) What dates are you open? <List dates or indicate if the dates vary each year.>
<If call for information and dates ➔Skip to Q16

14) Which hours are you open each day?

| | |
|---|---|
| Sunday | _______ to ________ |
| Monday | _______ to ________ |
| Tuesday | _______ to ________ |
| Wednesday | _______ to ________ |
| Thursday | _______ to ________ |
| Friday | _______ to ________ |
| Saturday | _______ to ________ |
| | ___Call for hours |
| | ___By appointment only |

15) Are there holidays or other dates that you are closed?

___New Year's Day
___Easter
___Memorial Day
___Independence Day
___Labor Day
___Thanksgiving
___Christmas
___Other <Specify>_________________

16) Which of the following amenities does your operation have?

___Public restrooms
___Handicap access
___Motor coach/bus access
___Picnic area
___Events hosted
___Public phone available

## *Section III:*

We would also like to ask you a few questions about your business that will better enable us to support Tennessee agri-tourism. The information you provide will help us to learn more about the industry and provide a baseline by which to track changes and improvements. Your answers to this section will be confidential and not associated with your name.

17) How many years have you operated an agri-tourism enterprise? (Total years of experience.)

18) How many people were employed in the following categories by your agri-tourism operation in 2002?<Enter Number for each>

Full time year round___
Part-time year round___
Full-time seasonally___
Part-time seasonally___

19) Approximately how many customers visited your operation in 2002?

20) What percentage of your <insert number from question #19> customers in 2002 visited…?

a. ___in organized groups such as school groups, church groups, travel/tour groups

b. Of those <percent in groups from 20a> percent who visited in groups, which portion visited with…
___School groups
___Travel/tour groups

c. Which portion of your <insert number from question #19> customers were….?
___One-time visitors

d. Which portion of your <insert number from question #19> customers were from…?
___In-state

21) What dollar amount did each customer spend on average at your operation per visit in 2002?

22) I am going to name some issues that you may have encountered during the start-up or operation of your agri-tourism business. Please rank each issue on a scale of 1 to 3 based on the level of difficulty you had with the issue. A rank of 1 means that you have had no difficulty with the issue. A rank of 2 means that you have had some difficulty, and a rank of 3 means that the issue was a major obstacle.

a.___Zoning
b.___Signage
c.___Liability insurance
d.___Taxation
e.___Licenses and permits
f.___Financing
g.___Competition from other agri-tourism enterprises
h.___Finding/hiring qualified employees
i.___Identifying markets
j.___Promoting your enterprise
k.___Preparing a business plan
l.___Visitor relations
m.___ Other________________________

23) Do you have signs on public roadways to direct visitor traffic to your operation?

___Yes b. If yes, how many?____
___No

24) Would you be willing to pay a one-time fee of $200 with an annual fee of $50 per sign to the Tennessee Department of Transportation to erect a sign with your business name, direction arrow and distance to your operation from a state highway?

___Yes
___No➔ Why?_______________________________

25) When you think of the future success of the agri-tourism industry in Tennessee, are you
___ pessimistic <check one>
___ neutral
___ optimistic

26) Do you plan to expand your agri-tourism enterprise in the next 3 years?

___ Yes
___ No

27) What is the single most important factor of success for an agri-tourism enterprise?

28) What services are needed that are not currently available to grow the agri-tourism industry?

29 What portion of your annual agri-tourism revenue do you spend on promotional activities?

___%

30) I am going to read a list of categories that describe the gross value of agri-tourism sales in 2002. Please stop me when I get to the category that describes your operation's 2002 agri-tourism sales.
___<$2,500
___2,500-4,999
___5,000-9,999
___10,000-24,999
___25,000-49,999
___50,000-99,999
___100,000-249,999
___250,000-999,999
___$1,000,000+

31) What percentage of your annual gross income from agriculture in 2002 was attributed to agri-tourism?
___%

That is all the questions that I have. Thank you for your participation.

**Figure 2: Number of Agritourism Enterprises by County (Map of Tennessee)**

Visit the UT Extension Web site at
http://www.utextension.utk.edu/

05-0027 PB1747-1M-10/04 R12-4010-013-001-05