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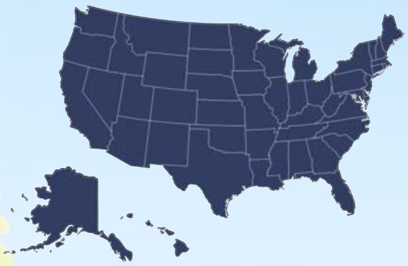

Insights on Agritourism Among US Producers: Evidence from the 2024 National Agritourism Producer Survey

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Erratum
Earlier versions of this document (issued April 23 and April 28, 2025) contained inadvertent omissions which cutoff part of a data label in Figure 3 and part of the legend for Figure 11. These were formatting issues which have been corrected in this version. Additionally information and a linked resource provided on at page 21 relating to Agricultural Mediation Programs have been updated to reflect programmatic updates. This version is issued June 3, 2025.

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Listing of Figures

Introduction

Agritourism and direct-to-consumer (DTC) sales have become an essential aspect of the U.S. agricultural landscape, offering economic benefits and opportunities for diversification (Schmidt et al., 2022). While the 2022 Census of Agriculture addresses agritourism and recreational services, and DTC separately, we define agritourism following Chase et al. (2018) and include both income sources as agritourism in this integrated research-Extension project. Our recent analysis found that 28,617 agricultural operations reported earnings from agritourism or recreational services, a figure that has remained relatively stable since the 2017 Census of Agriculture, which documented 28,575 such operations. Agritourism activities generated $1.26 billion in receipts, accounting for 5.7% of total non-agricultural product sales revenue. On average, each operation earned $44,004 in gross revenue from these services in 2022, marking a 33% increase in gross receipts since 2017. The overall proportion of farms engaging in DTC channels has slightly decreased from 6.4% in 2017 to 6.1% in 2022. In 2022, an estimated 116,617 agricultural operations sold agrifood products directly to consumers, down 10.3% from 130,056 in 2017. These DTC sales are predominantly driven by small-scale farms, with 81.2% of DTC-selling farms in 2022 earning below $50,000 in gross receipts and 67.37% operating on less than 50 acres (Entsminger and Schmidt, 2024a,b).

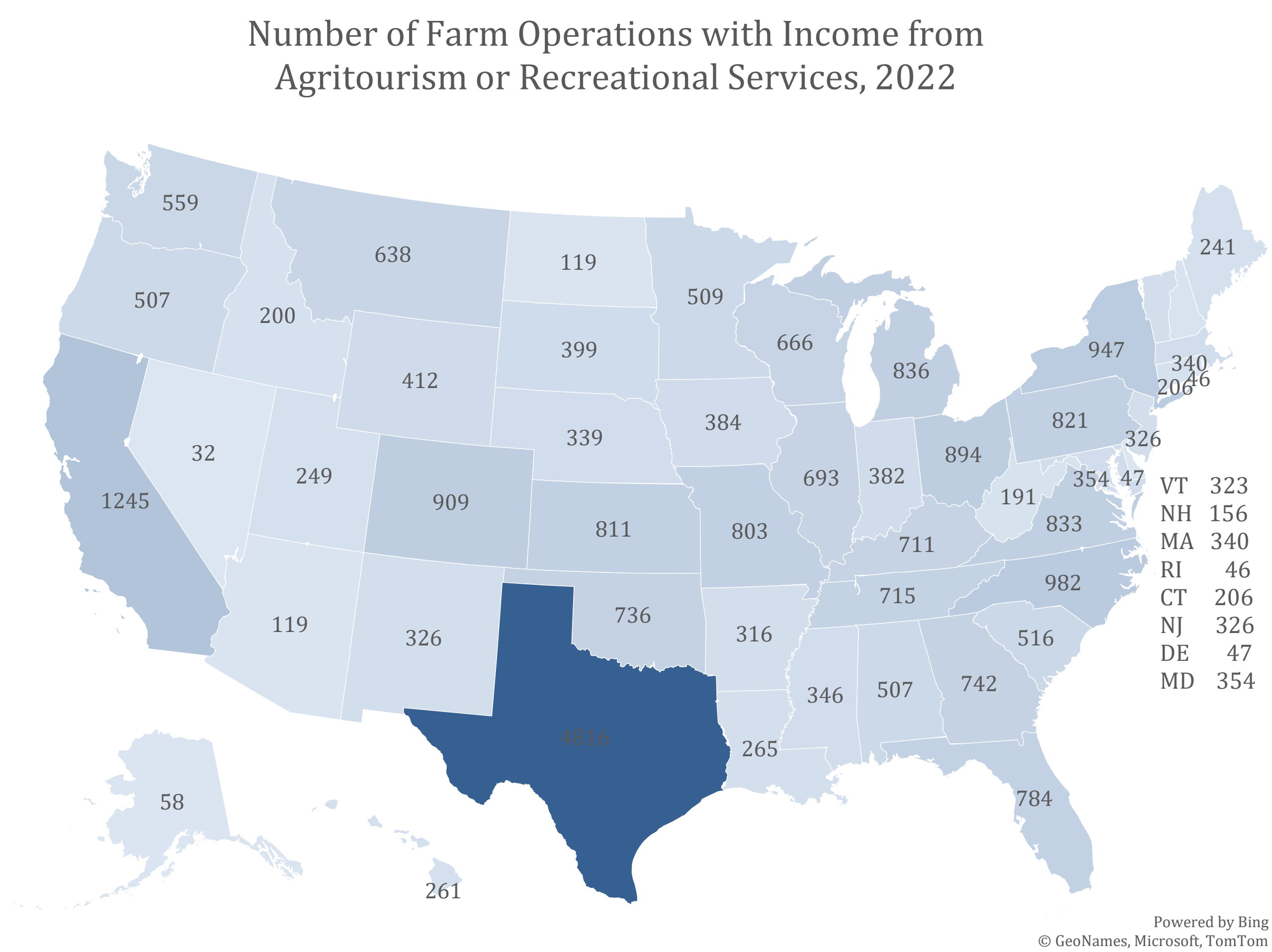

Figure 1 Number of agritourism operations by U.S. state in 2022. Source: Entsminger and Schmidt (2024a)

Only 1.5% of American farms engage in agritourism and 6.1% in DTC, suggesting untapped potential. The distribution and economic development of agritourism operations across the United States presents a varied picture. For example, while states like Vermont and Massachusetts have experienced substantial growth in the number of agritourism operators, Texas has seen significant declines. Nevertheless, Texas is leading in both the number of agritourism operations and total income, and has experienced a significant 106% increase in the value of DTC sales, representing an additional $58.3 million in revenue. At the same time, 62% of states saw declines in DTC sales, with Nevada experiencing the most significant decrease, equating to a $12.5 million loss (Entsminger and Schmidt, 2024a,b). This highlights regional disparities and opportunities for expansion.

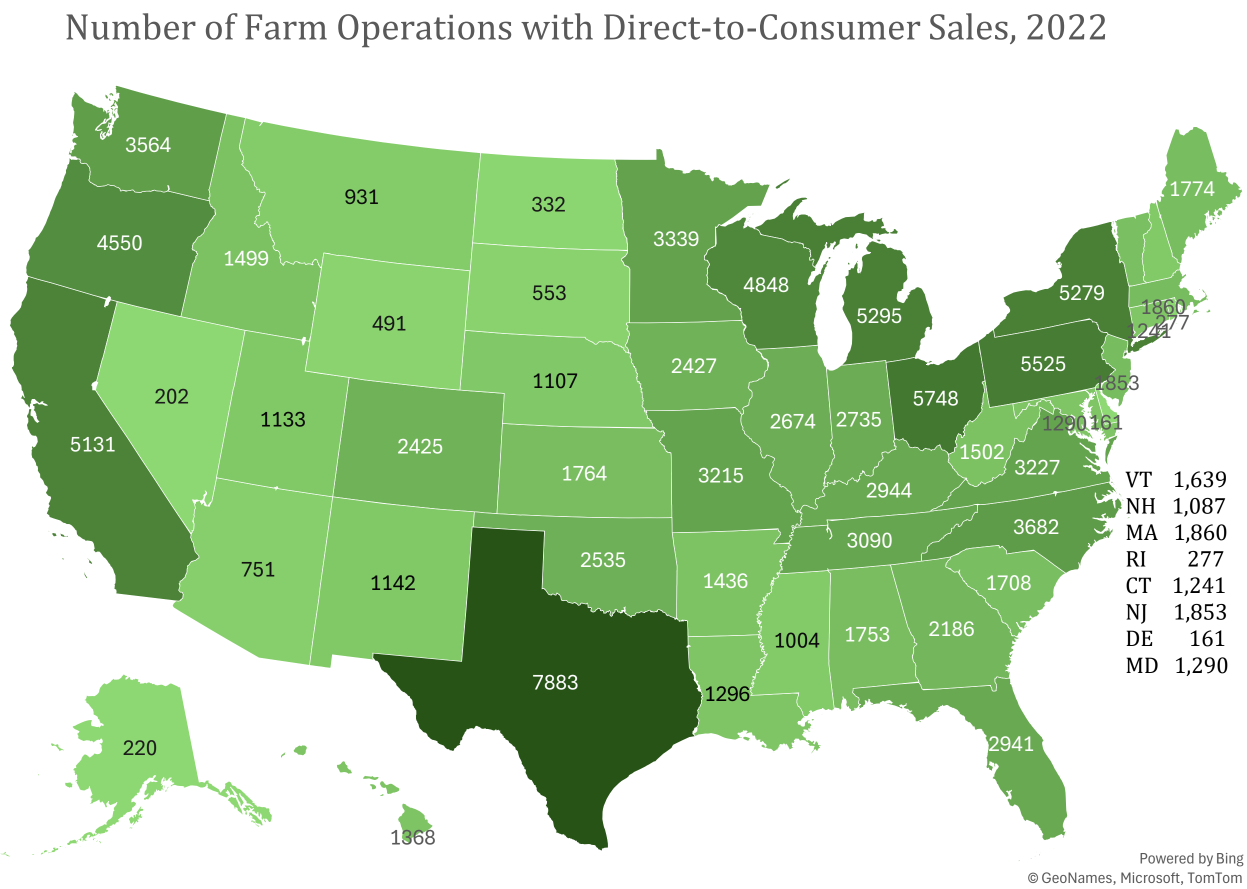

Figure 2 Number of Direct-to-Consumer Sales operations by U.S. state in 2022. Source: Entsminger and Schmidt (2024b)

This report presents findings from the *2024 National Agritourism Producer Survey*. The survey questionnaire was developed by researchers from Penn State, the University of Maine, the University of Vermont, and Oklahoma State University. This survey is part of a larger project aimed at defining and enhancing the agritourism support system in the United States. The primary objective of conducting this survey was to identify areas where targeted interventions and programs can support agritourism development across the country. Respondents were asked to evaluate several critical factors that impact their agritourism business. This included rating the degree to which they felt different aspects of the environment pose a challenge to developing agritourism in their region, tourism features of the region in which they operate, the socio-cultural environment in which they operate, and their views on how challenging the regulatory landscape is to their agritourism business. The online survey was open from March through August 2024, and 2,139 agritourism operators across the United States responded.

By presenting these results, we aim to help individual farmers, producer organizations, and rural community leaders target investments and advocate for change to support the development of agritourism support resources.

Where are responding agritourism operations located?

Agricultural producers responding to the survey were in both metropolitan and rural (non-metro) counties (Fig. 3) all across the country (Fig. 4). While many (45.9%) of the 2,139 responding farms did not indicate their state or county, the vast majority provided information about where their farm is primarily located by indicating its zip code. Using the USDA's Rural-Urban Continuum Codes and information about farm location, we can classify the counties where respondent farms are located.

A majority (91.3%) of agritourism operations are located in or adjacent to metropolitan zones. The bulk of these are in metropolitan-designated counties, including 23.2% in counties with populations of more than 1 million, 26.5% in counties with 250,000 to one million residents, and 15.9% in metro counties with less than 250,000 residents. Another 25.7% live in counties that are rural, but which immediately abut a metropolitan neighbor. In fact, just 8.7% of the respondents are in "remote" non-metro counties – the most rural types in the RUCC classification scheme. This includes 1.4% in remote counties with an urban population of 20,000 or more, 2.8% in those with urban populations between 5,000 and 20,000, and 4.5% in those remote counties with fewer than 5,000 residents of urban spaces (i.e. the most sparsely populated counties in America).

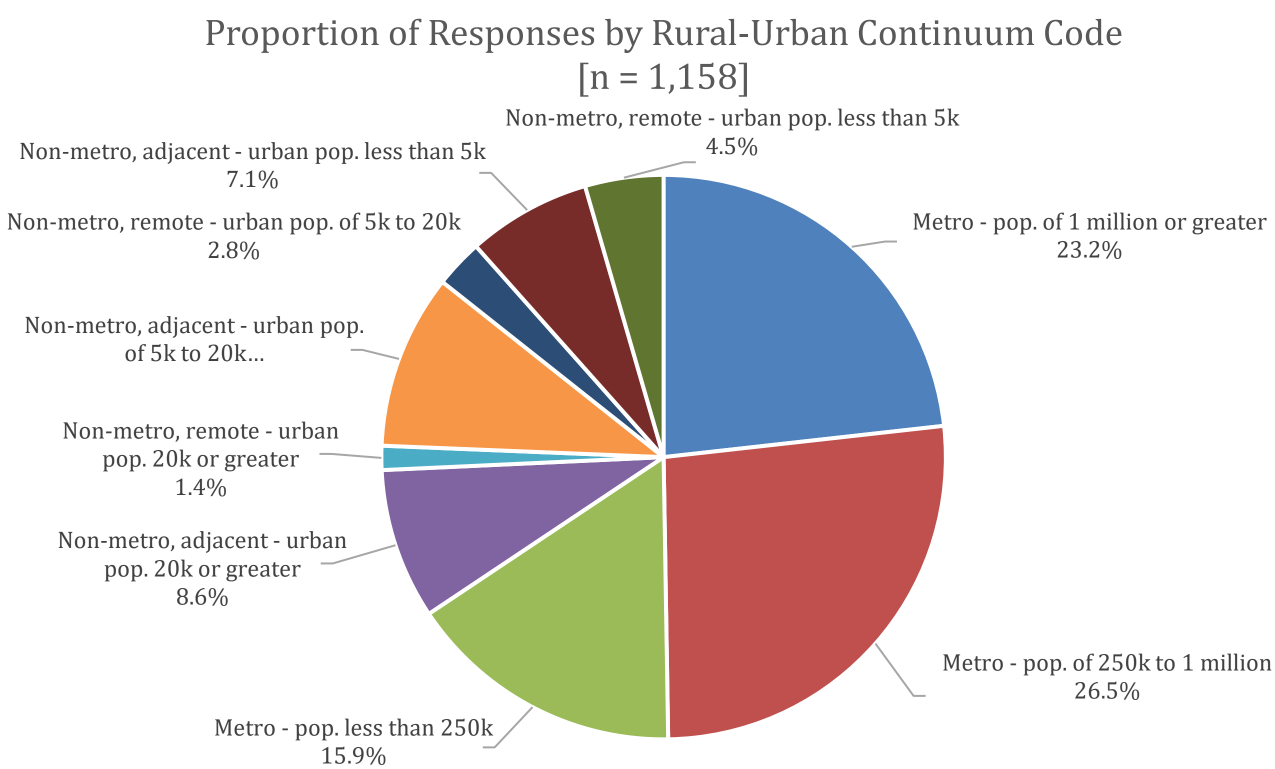

Figure 3 Community type by the Rural-Urban Continuum Code (RUCC) classification of counties

These results indicate that many operations with agritourism enterprises occur within relatively easy travel from a town, city, or major metro – in other words in peri-urban spaces near population centers.

Geographically, survey respondents are more heavily drawn from along the eastern seaboard. This may be driven by research team networks and survey sampling methodology. Pennsylvanians account for the largest proportion of survey respondents (9.4%), followed by Tennesseans (5.6%), Mainers (4.4%), and North and South Carolinians (each approximately 3%). Also within the Eastern half of the nation were responses from New York (2.8%), Kentucky (2.3%), Maryland (2.1%), and West Virginia (1.59%). Responses indicating their location as in California (2.5%) and Washington (2.2%) ensure we know West Coast perspectives are contained in the observed sample set.

No responses were received from Nevada or Alaska-based operations – not surprising given that USDA's most recent agriculture census estimates indicate these states as having the fewest number of farms engaged in agritourism and recreational services (Fig. 1). That USDA Census of Agriculture procedures do not enable the inclusion of operations with on-farm sales (e.g. on-farm stands, stores, or CSAs) within estimates of the agritourism firm population means it is difficult to compare response rates in our survey to these estimates. However, we do recognize the survey unintentionally has over-sampling in the Eastern U.S. and under-sampling in the Midwest and Texas.

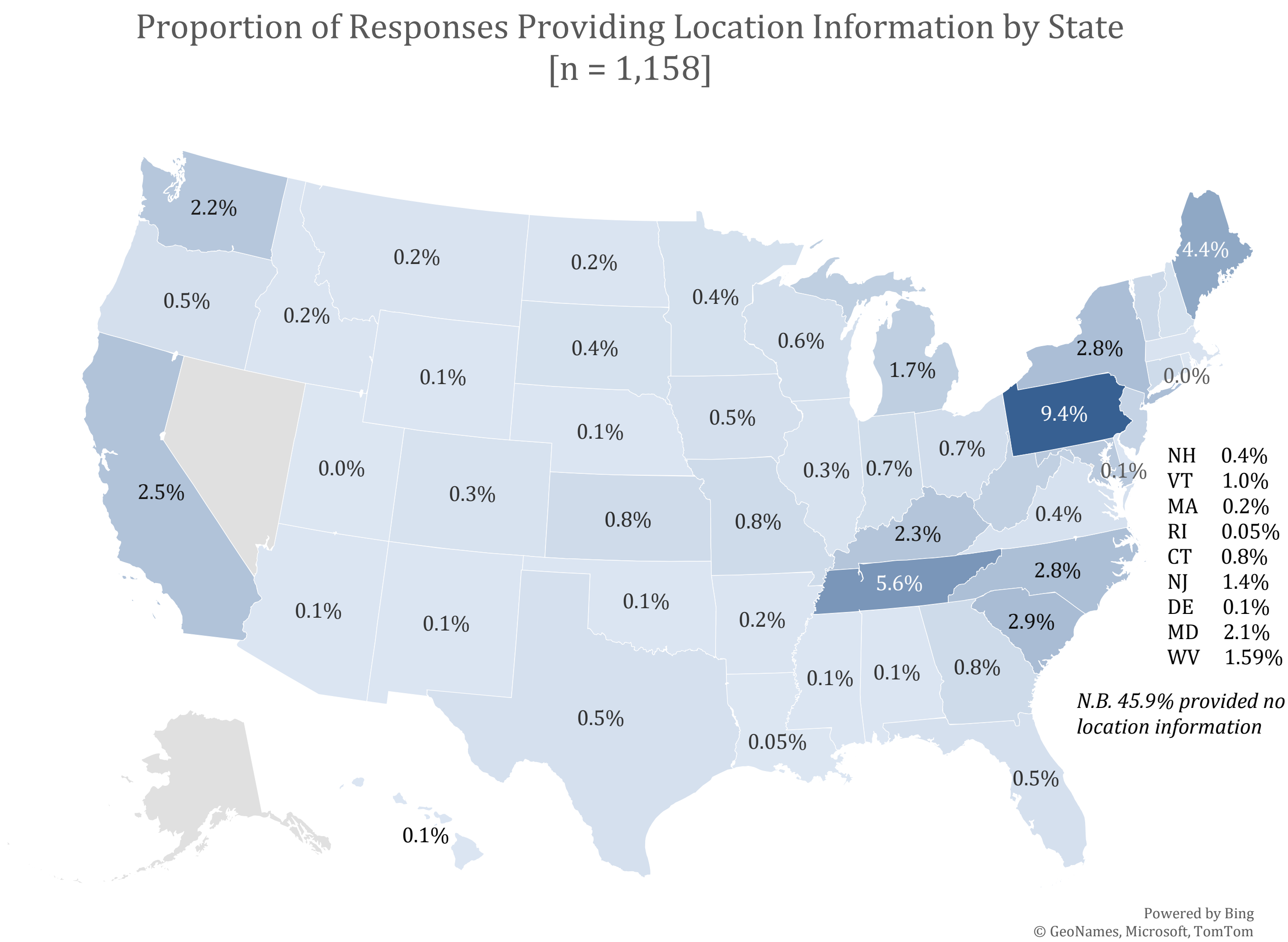

Figure 4 Location of responses by state

How large are responding agritourism operations?

Overwhelmingly, responding farms were small- or medium-scale. There are many ways to evaluate farm scale, such as sales volume or value, acreage, and managerial labor use. The USDA's Economic Research Service (ERS) has historically provided a typology or classification of U.S. farms that utilizes the gross value of sales, ownership structure, and operator status (retired or not) to place farming operations into groups. The 2024 National Agritourism Producer Survey did not collect all the information used by USDA ERS, but it did ask respondents to indicate the category best representing their gross value of sales from all farm-related sources in 2023. It also asked respondents about the number of acres used by the operation and the number of owner/operators providing managerial or decision-making to the farm.

Figure 5 shows the proportional distribution of responses from agritourism operations across categories of gross sales value. Approximately 75.9% of the 1,127 respondents who provided this information would likely fall within the USDA ERS classification of "small farms" (USDA, 2024), as they reported less than $350,000 in gross sales for 2023. Notably, this includes 8.9% with less than $1,000 in sales and thus who may not qualify as a farm operation under certain Federal program definitions. An additional 10.9% would likely fall within the mid-sized farm category ($350,000 to $999,999 in sales), with 2.8% being large operations and 5.3% being very large operations.

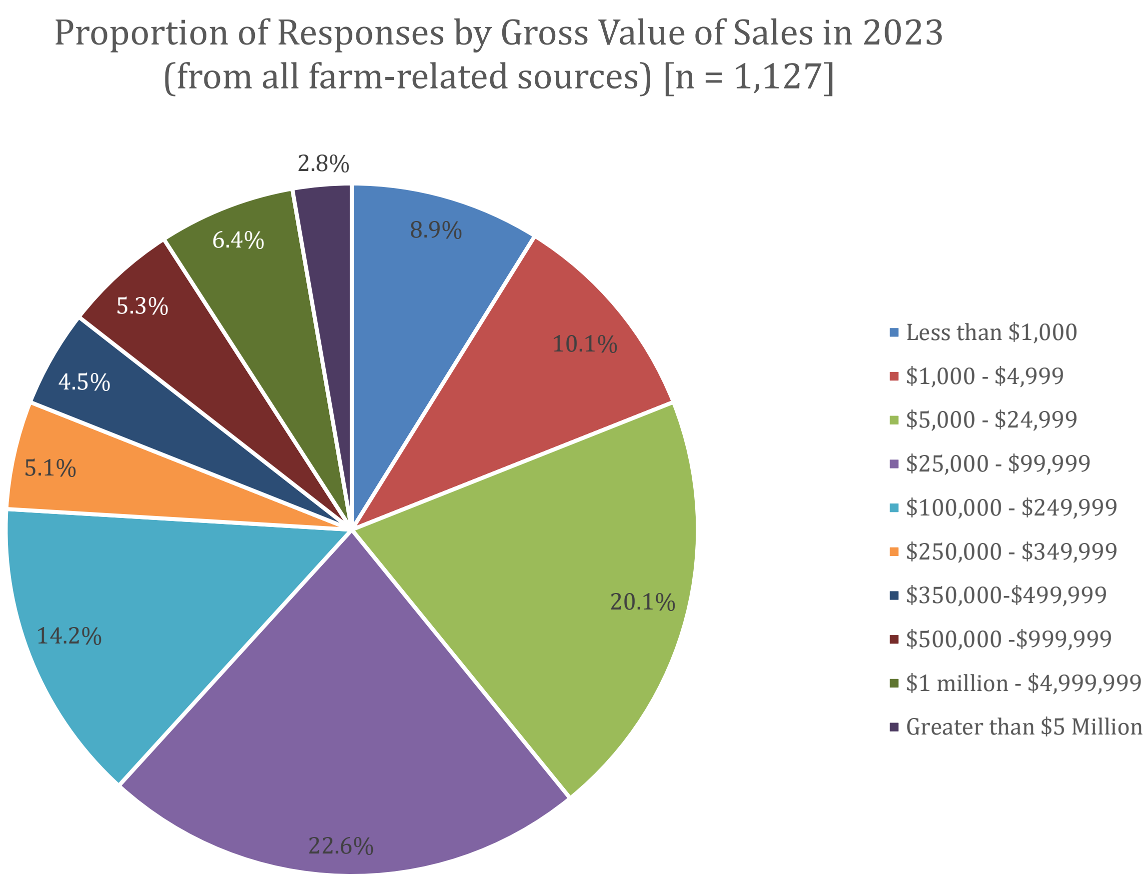

Figure 5 Gross sales from all farm-related sources in 2023

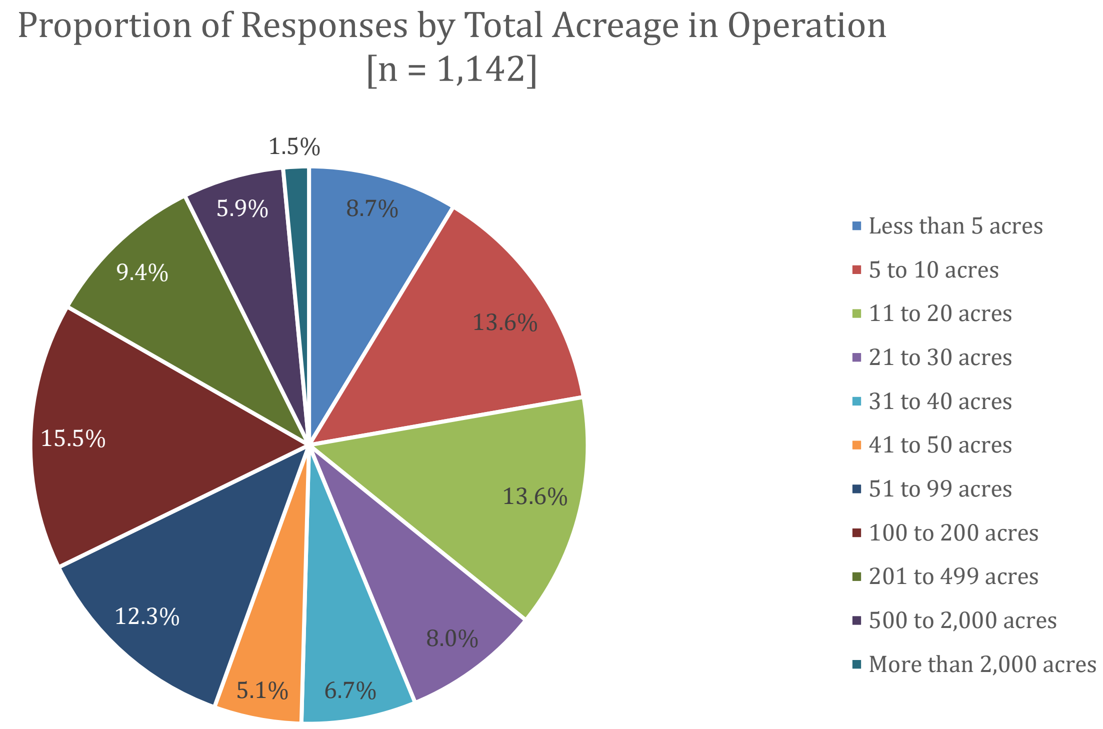

Figure 6 Total acreage reported in the operation for 2023

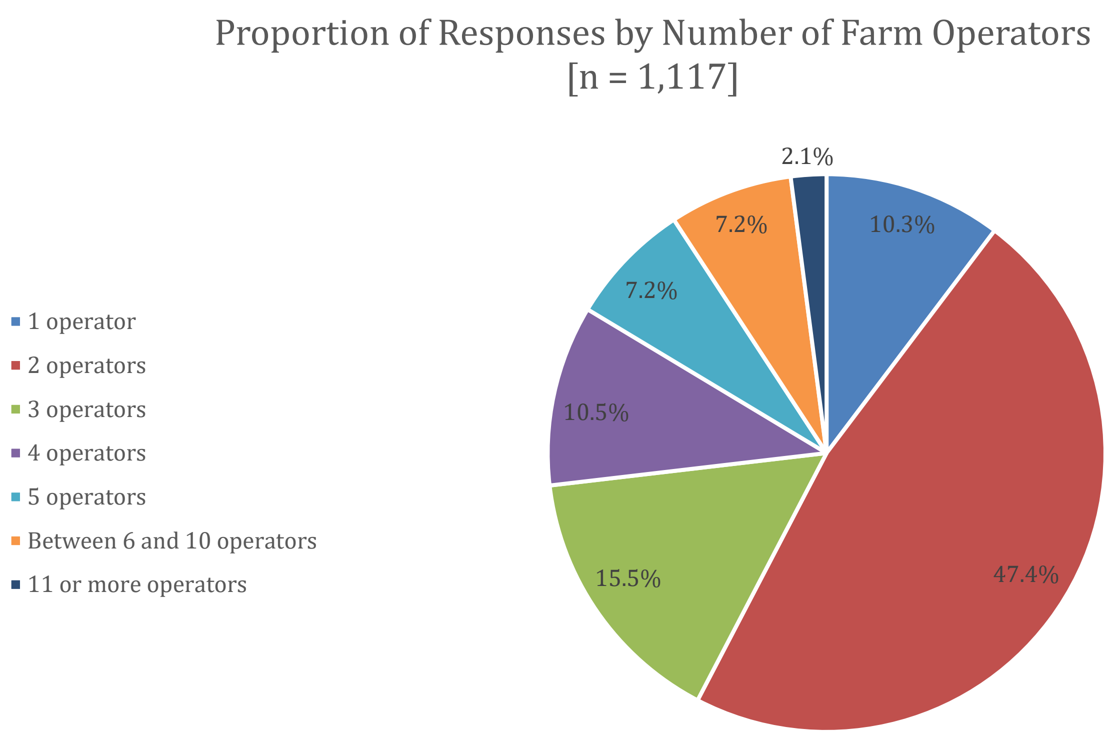

Figure 7 Number of farm operators making decisions for the operation in 2023

Category boundaries for farm size using land area and number of operators are not well established. In Figure 6 we report the proportional distribution of responses across 11 acreage groupings. In the survey, respondents reported the specific number of acres within their operations, and the groupings were created based on the distribution of responses. Most agritourism operations reported 50 acres or fewer available to them in 2023; 55.5% of the 1142 responses to this question were at or below this common benchmark for "small farms". Some 37.2% reported between 51 and 499 acres, a common range for defining "mid-sized" operations. Only 7.4% of the agritourism operations would likely be considered large farms by acreage, having 500 or more acres.

Managerial and decision-making labor available on the farm can be an indicator of operational complexity and organizational size. USDA estimated that in 2022 roughly 40.4% of all U.S. farms had a sole operator and 47.3% had two operators. Our sub-sample of agritourism operators shows a similar proportion indicating the farm had two operators making decisions in 2023, at 47.4% of the 1,117 responses. However, only 10.3% of the operations reported 3 or 4 operators and 16.5% indicated 5 or more; compare these to 10.7% and 1.8%, respectively, estimated for all farms by USDA. Thus, compared to national estimates for the whole farm population, it appears agritourism operators rely on greater numbers of owner/operators making decisions, and thus have increased managerial scale and complexity.

What types of activities and products are offered by operations with agritourism enterprises?

The survey posed questions to learn more about the types of products grown or made on the farm and the types of agritourism activities offered which welcome visitors. For both questions, respondents could select from a number of pre-populated answers and could also share other answers via free response. In total, 1,631 survey participants engaged in this questionnaire section.

Figure 8 presents the proportion of respondents that indicated different product types were present on the farm. More than one item could be selected. Not included in Figure 8 is data for herbs and spices, equine species, hops, hemp/cannabis, bakery, mushrooms, and tree nuts – items which were indicated by fewer than 1% of respondents. Responses indicate the most common products available from operations with agritourism enterprises: 56% grew fruits and vegetables in 2023; 54% had animals and animal-related products; 35.9% offered value-added products (such as jams, pickles, sauces, cheese, or wine); 29.1% had nursery products, flowers, or Christmas trees; and 21.9% producing row or field crops (such as wheat, soy, or hay).

Most respondent farms have diversified production systems; 62.4% indicated more than one type of product is grown or made by the farm. Further, 30.7% of respondent operations have both specialty crop and livestock enterprises within their production activities, meaning that many mix both horticultural and animal husbandry practices on their farm. Of the 586 farms that reported value-added production, 69% indicated fruits and vegetables and 55% indicated animal products.

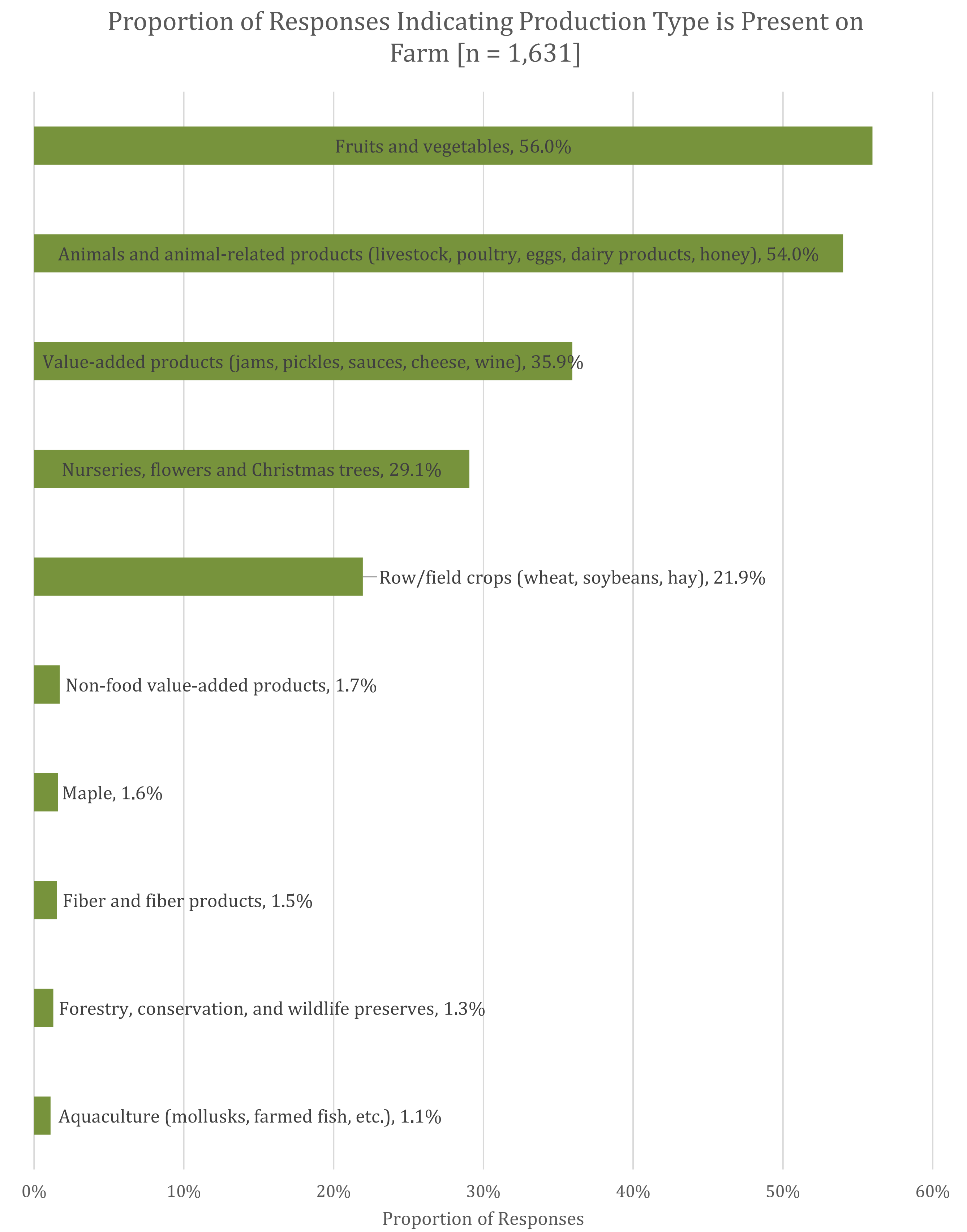

Figure 8 Type of production activity present on farm in 2023

Agritourism operations have many different activities and strategies for welcoming visitors to the farm and providing experiences for them. Figure 9 reports the proportion of the 1,601 responses indicating any given experience or activity was offered in 2023. Notably, one of the activities – off-farm direct sales – was included in the survey as an option because this is a highly contested issue within Federal data collection as mentioned previously; agritourism definitions tend to require the activity to happen on the farm, but USDA data does not allow for separating on-farm direct sales from off-farm direct sales readily (also see Hollas et al., 2024).

This is critical as results in our sample indicate that the most common agritourism activity – indicated by 62.8% of respondents – in 2023 was sales made directly to consumers on-farm via on-site stores or stands, Community Supported Agriculture subscription pick-up points, etc. Following that, the next most common activity was educational activities, such as tours or workshops, which accounted for 59.4%. This was followed by events, including farm-to-table dinners and weddings, with 35.9% of respondents offering such experiences. Off-farm direct sales were offered by 35.6% of respondents. The least common activities were hunting (9.9%) and a new category – wellness activities – which was created based on free responses, such as yoga, wellness retreats, and forest bathing.

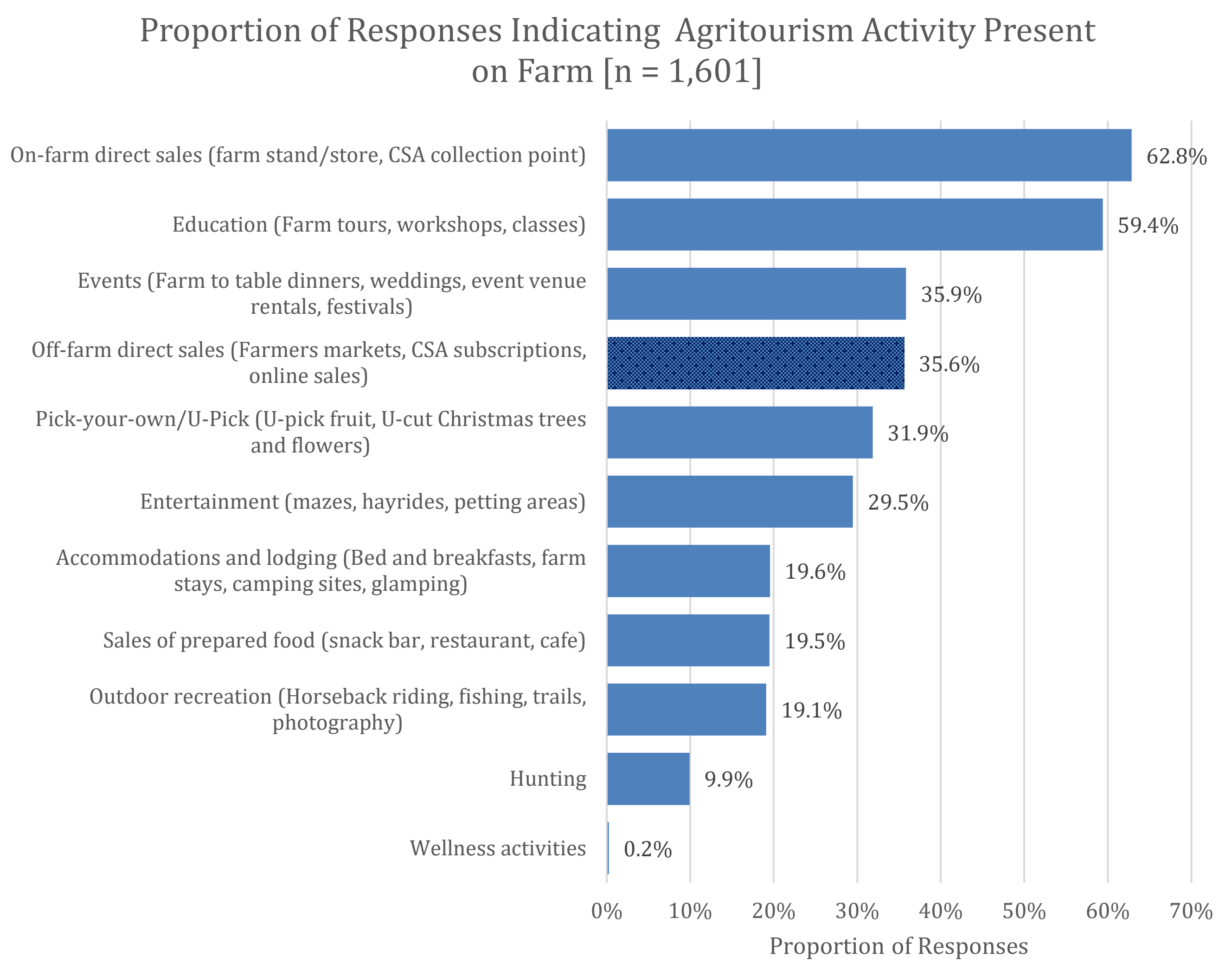

Figure 9 Type of agritourism activity present on farm in 2023

What are the economic impacts of agritourism activities to farms?

Often agritourism activities are identified as a means of income diversification for individual farms and within rural economies. Thus, it is important to monitor the potential effects agritourism has in terms of increasing farm gross sales value and to determine if agritourism firms themselves are profit contributors to the whole-farm bottom line. Respondents were asked to provide information about their operations on these topics.

Figure 10 reports the distribution of respondents across categories of gross sales value obtained in 2023 from agritourism and recreational services. For 18.2% of respondents, agritourism accounted for less than $1,000 in sales. Most farms (54.4%) had between $1,000 and $99,999 in agritourism sales. Approximately 21.2% of responding firms saw 2023 sales from tourism and recreation activities ranging from $100,000 to $1 million, and only 6.2% had more than $1 million. While sales information provides an indicator of activity volume, the profitability of that activity provides an indicator of the effects on farm incomes.

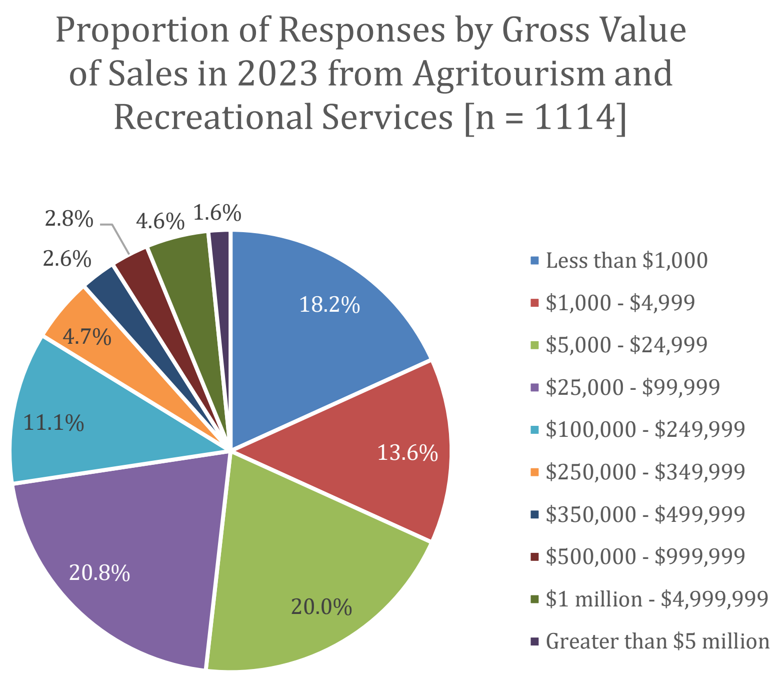

Figure 10 Gross sales value from agritourism or recreational services in 2023

The distribution of respondents across agritourism profit categories is reported in Figure 11. Many agritourism enterprises operated at a loss or break-even (32.1%) or contributed less than $1,000 (10.6%) in net income to the farm. Another 46.3% reported between $1,000 and $99,999 in profit from agritourism and recreational services in 2023. Just 11.0% reported higher net earnings, in excess of $100,000 from agritourism.

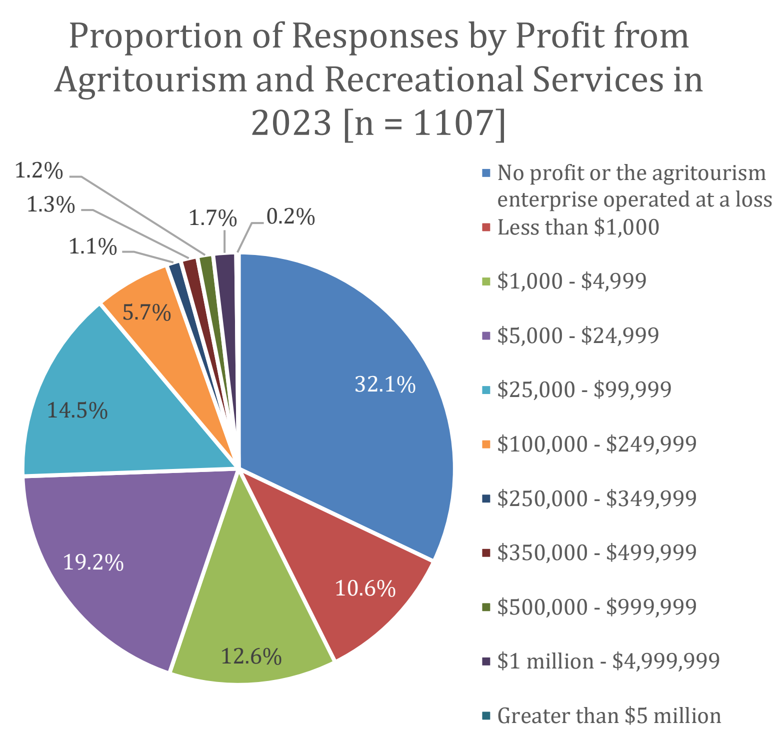

Figure 11 Profit (net income) from agritourism or recreational services in 2023

What is the timing, volume, and operator experience level with agritourism activities on farms?

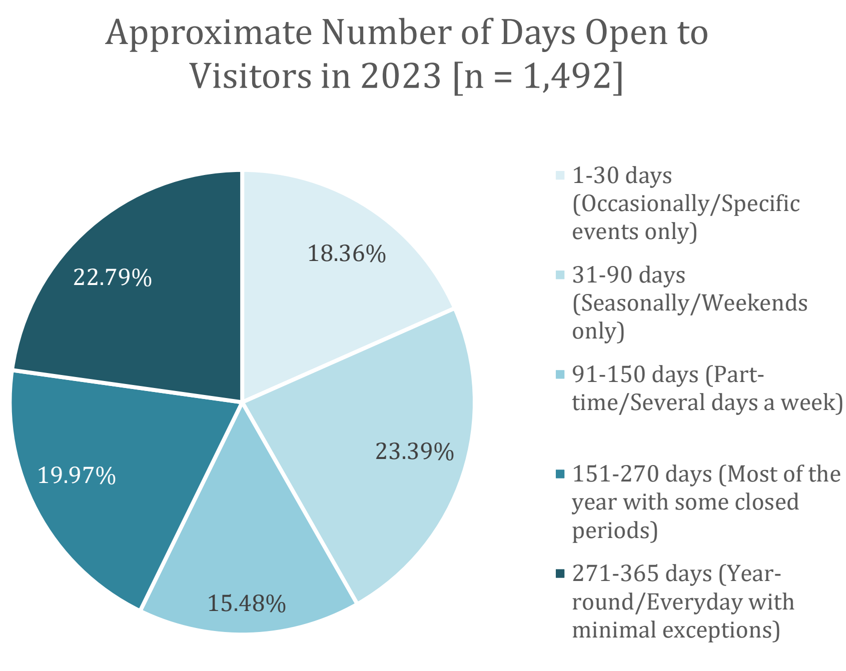

Figure 12 Number of days open to visitors in 2023 (approx.)

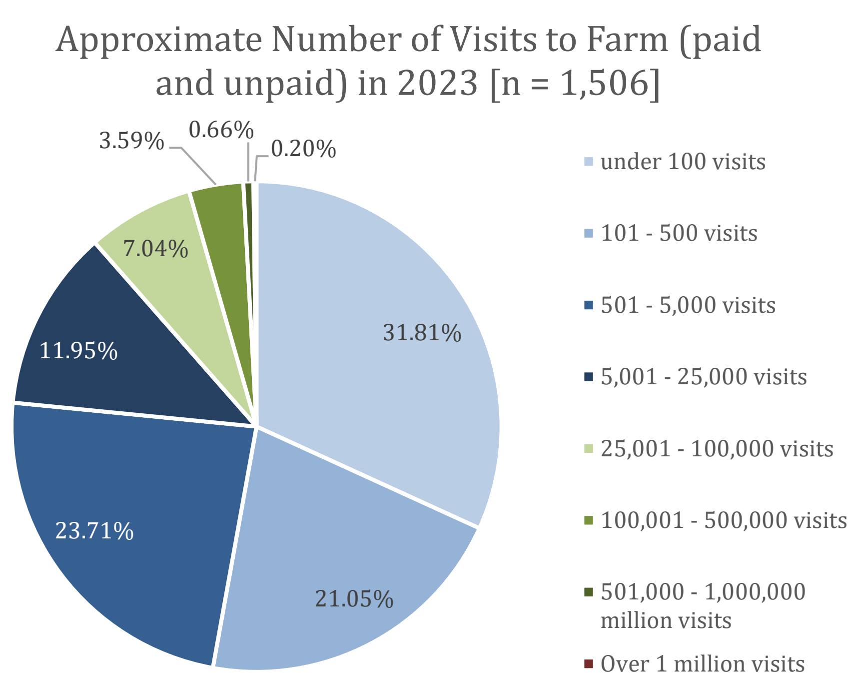

Figure 13 Number of visits to the farm (paid and unpaid) in 2023 (approx.)

Most agritourism farms (57%) were open to visitors part-time (150 days or less) in 2023. Figure 12 reports the distribution of responses across five different timing windows presented in the survey question about the approximate number of days the farm was open for visitor activities. These results indicate that for most, agritourism is supplemental activity engaged in by farms only part of the year.

This is further supported by data in Figure 13, which reports the proportion of responses across categories of annual visits to the farm in 2023. Approximately 77% of respondents had fewer than 5,000 total visits that year. This included one-quarter (23%) who had fewer than 100 visits.

Notably, a plurality (33%) of the operations also had fewer than 5 years of experience in agritourism activities, with an additional 25% having between 5 and 10 years of experience in agritourism (Fig. 14). This highlights the relative newness of agritourism enterprises. It also indicates that many firms likely instituted agritourism activities shortly before, during, or immediately after the COVID-19 pandemic.

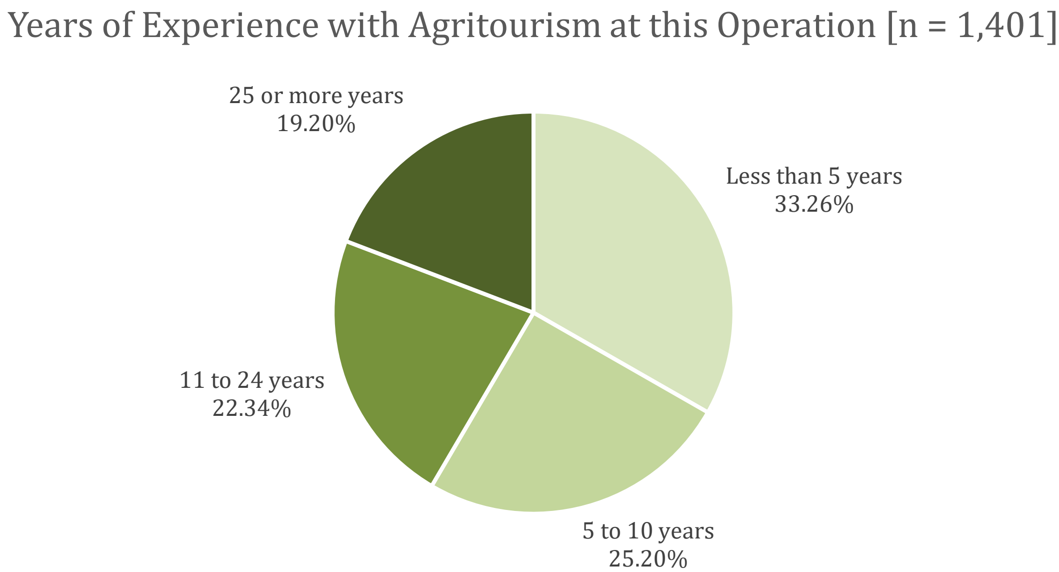

Figure 14 Years of experience with agritourism at this operation

Who is operating agritourism enterprises and responding to the survey about their enterprises?

In line with accepted social scientific practice, the survey also collected demographic information about respondents and about managers or owners operating the farm. In total, 1,161 respondents provided information about the highest level of education they personally have received (Fig. 15). The greatest proportion of respondents (40%) hold a four-year college degree. This is followed by 28% with postgraduate degrees like an MBA or PhD. Smaller segments include those with some college experience (13%) and technical degrees from 2-year colleges (11%). At 4.3%, the smallest group comprises high school graduates or those with less education.

A similar number (1,168) also provided information about their primary occupation (Fig. 16). The majority (67%) listed working for their farm or ranch as primary. Off-farm work accounted for 26% of respondents, representing a significant portion engaging in external employment. A smaller group, totaling 5%, identified as retired, homemaking, or not working due to disability. Only 2% chose not to disclose their primary occupation.

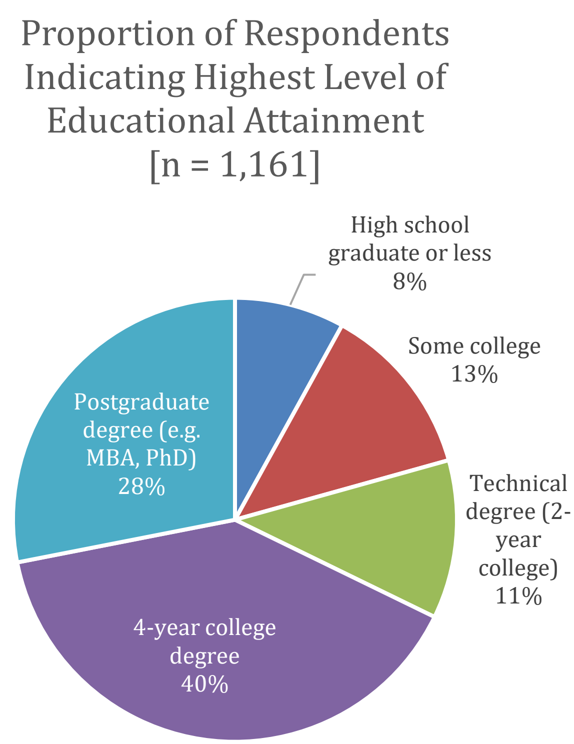

Figure 15 Highest level of educational attainment for respondent

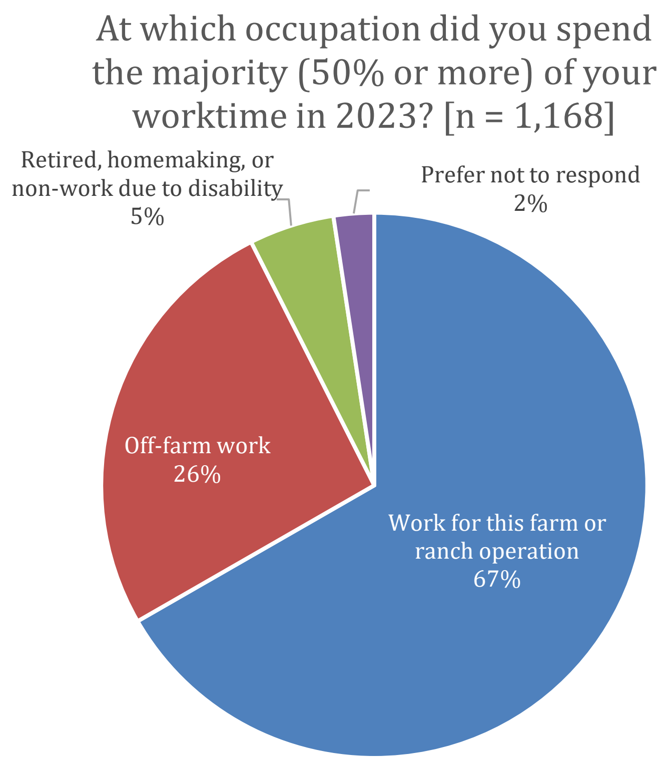

Figure 16 Primary occupation of respondent in 2023

Results also provided information about the backgrounds of respondents. The majority (59.5%) were female [n=1,161]. In terms of veteran status [n=1,165], 87% reported that they had never served in the military. Additionally, 9% indicated that they had previously been on active duty, while 2% were involved in training for the reserves or the National Guard. Only one respondent was on active duty and currently serving in the military.

Of the respondents, 840 offered information about the number of operators – those managing or owning the firm – from various groups; 92.3% of agritourism operations had at least one woman leading the farm, 18.3% had at least one military veteran operator, 9.4% had at least one operator from a non-White background, 8.6% had at least one operator who identified as LGBT, and 2.6% were new Americans.

How do agritourism operators view their entrepreneurial environments?

One goal of the 2024 National Agritourism Producer Survey is to identify areas where directed programming and interventions can support the development of agritourism enterprises. Respondents were presented with a series of rating questions where they were asked to evaluate several critical factors about the entrepreneurial ecosystem in which they are pursuing their ventures. This included rating the degree to which they felt different aspects of the environment pose a challenge to developing agritourism in their region (Fig. 17), an evaluation of key complementary tourism features of the destinations in which they operate (Fig. 18), their agreement with a set of statements describing the socio-cultural environment in which they operate (Fig. 19), and their views on how challenging different facets of the regulatory landscape are to their agritourism business (Fig. 20).

The Community Capitals Framework (Flora, Flora, & Gasteyer, 2016) was employed as a conceptual model for evaluating environmental factors. Financial capital – such as funding to promote agritourism in a region or directly funding producers with agritourism operations – was the most challenging environmental aspect for agritourism operators, with 43% indicating it as very or extremely challenging. This was followed by political capital and governance (32% rating very or extremely challenging) and built or physical capital (31% selecting very or extremely challenging). These three aspects all had a majority of respondents rate them as at least moderately challenging. Agritourism operators generally rated social and cultural capital and market conditions as least challenging to the development of their tourism-focused enterprises; more than 70% of respondents rated each of these as only slightly challenging or posing no challenge at all.

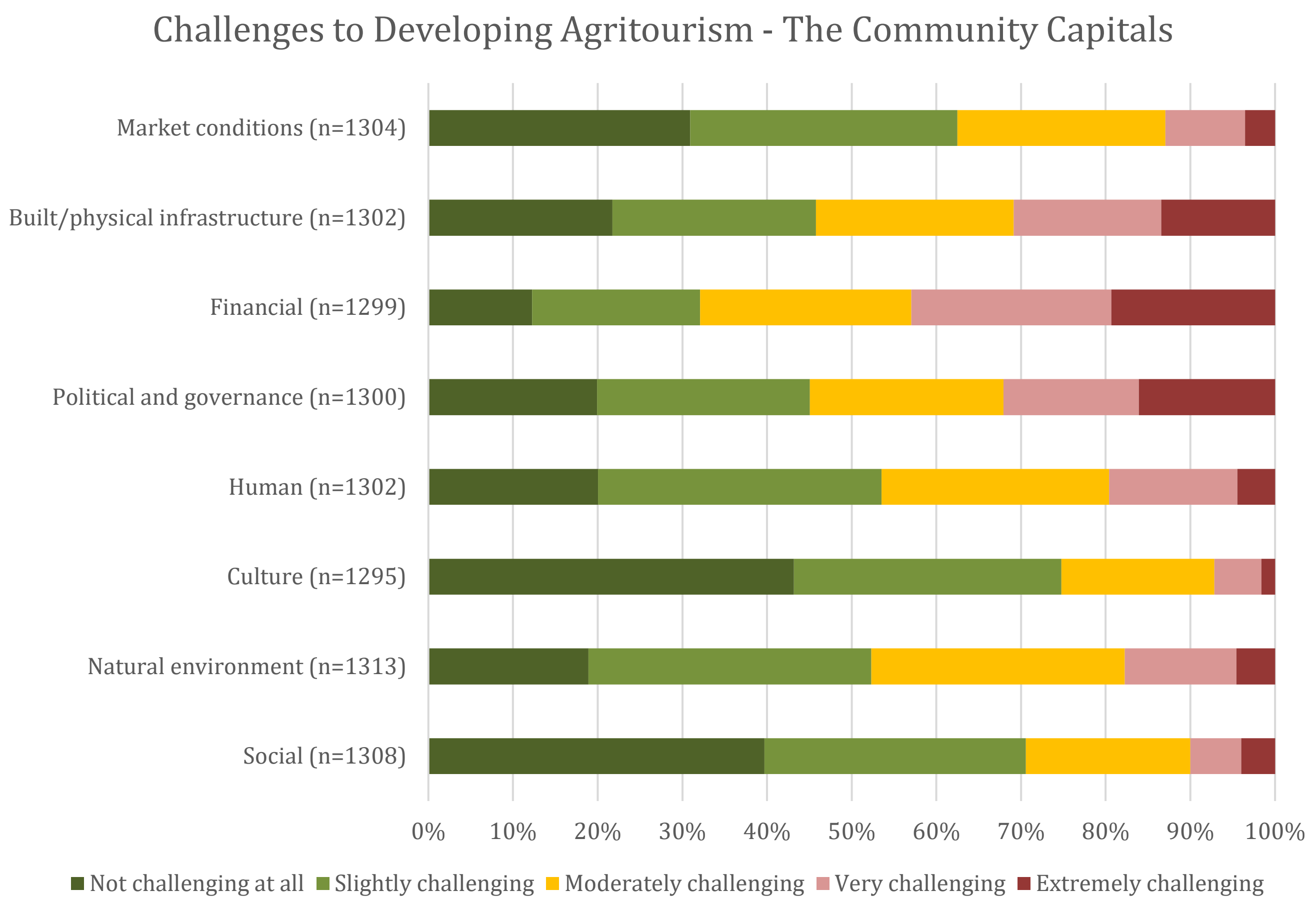

Figure 17 Distribution of respondent ratings of the challenge posed by various entrepreneurial ecosystem features using an augmented Community Capitals Framework

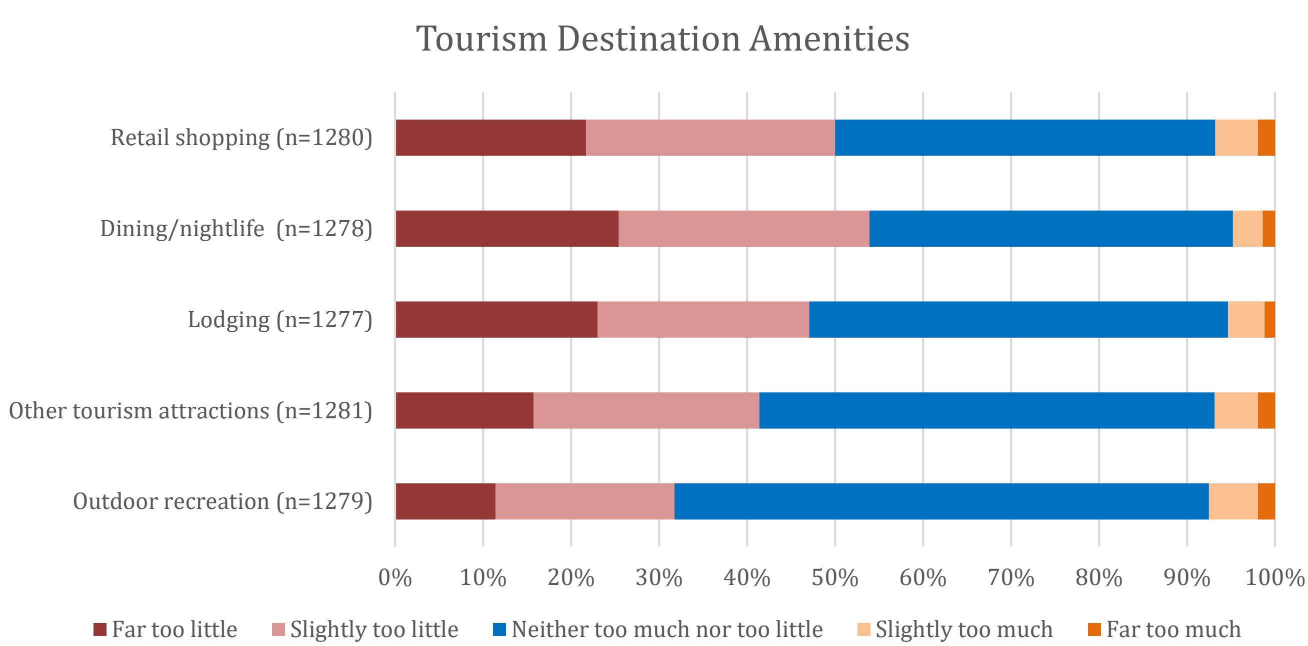

Figure 18 Distribution of respondent ratings of tourism destination amenities in their region

When evaluating a set of five tourism destination amenities within their region (Fig. 18), a plurality of respondents indicated there was neither too much nor too little of every given amenity type. Moreover, very few (less than 10%) indicated their destinations had "too much" of a given amenity. This may be a sign of relative contentment among many producers with the level of destination development in their regions; notably, many of the respondents are in urban or peri-urban counties (recall Fig. 1). However, dining/nightlife and retail shopping amenities are most likely under-developed, with 53.9% and 50.0% of respondents indicating these as slightly or far too little in their regional destinations. This opens potential strategies for agritourism enterprises to fill these gaps (e.g. establishing an on-farm restaurant, creating barn cocktail hours, etc.) and highlights the importance of developing economic vibrancy in small towns and villages near farming communities. Notably, the amenity least identified as having too little in an agritourism operation's destination was outdoor recreation activities.

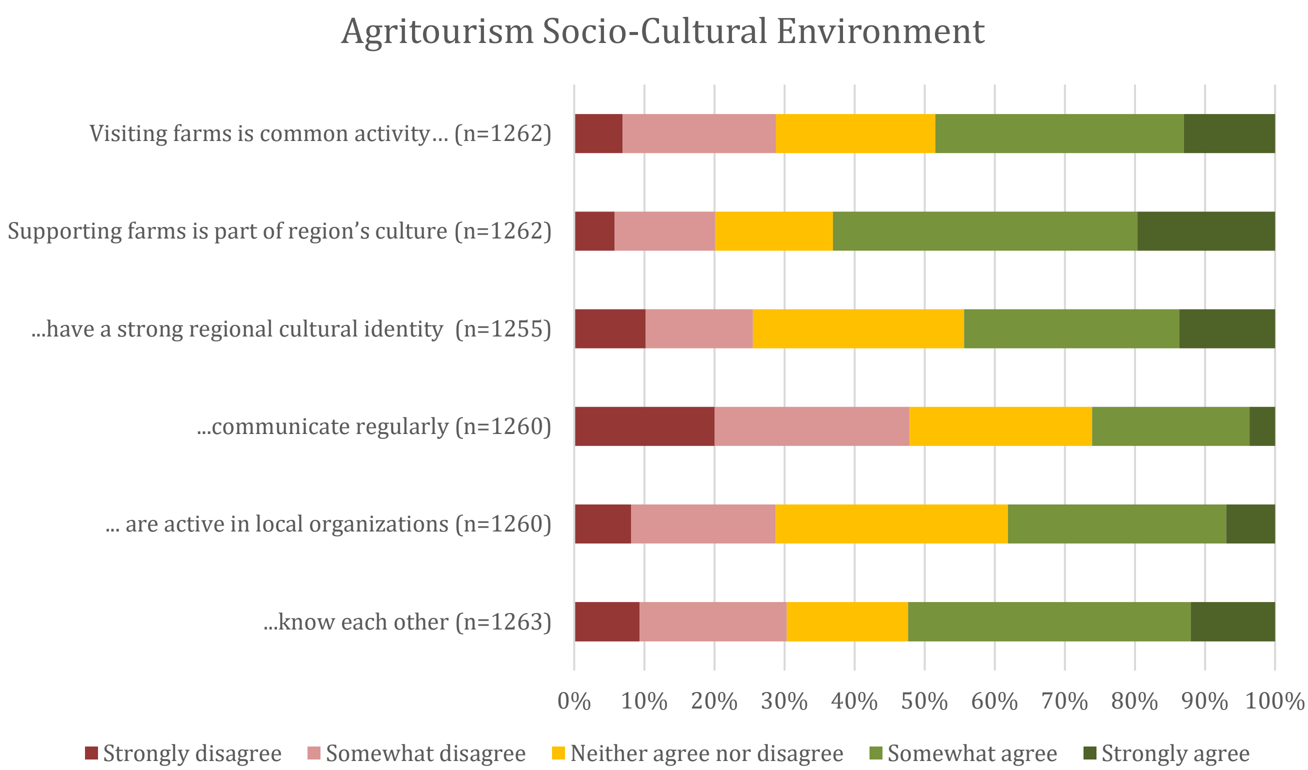

Figure 19 Distribution of respondent ratings of agritourism socio-cultural environment

Support ecosystems for entrepreneurial activities are also driven by the social and cultural aspects of the business environment (Fig.19), which influence market demand, consumer behaviors, and access to entrepreneurial resources. Most respondents agreed with statements positively evaluating the consumer-focused elements of the socio-cultural environment; 63.1% somewhat or strongly agreed that supporting farms is part of their regional culture, and 48.5% said that visiting farms is a common activity for regional residents. Similarly, 52.3% somewhat or strongly agreed that agritourism operators around them know each other, an indicator of entrepreneurial networks within their region's agritourism industry. Some 44.4% agreed that agritourism operators near them have a strong regional cultural identity, 38.1% agreed these operators are active in local organizations, and just 26.2% indicated these operators communicate regularly. These latter three facets are indicators of the strength of ties. Strong ties are often associated with developing regional brands and collective strategies that help drive destination development. However, results indicate that among the respondents, these agritourism operator networks may be largely composed of weak ties.

The regulatory landscape for agritourism is rapidly evolving and often fragmented, with different approaches to crafting and implementing regulations across states and localities. Regulatory compliance can be a challenge for many small businesses and for those firms transitioning from predominantly product-oriented strategies to mixed product-service strategies. To evaluate this complexity, respondents were asked to rate eight regulatory issues on how challenging they were for their business but were also provided the option to indicate if they were uncertain or the item was not applicable to their business (e.g. farms with no animals are not likely to be subject to the provisions of the Animal Welfare Act).

Civil liability was the most challenging regulatory item for agritourism operations (Fig. 20); it was the only item for which a majority (53.1%) indicated it was a moderate or greater challenge. Designating agritourism operations as retail sites – which often imposes certain infrastructure and facilities requirements on businesses – was the second most challenging, with 45.7% selecting moderately or greater. Both civil liability and designation as a retail site also had at least one-quarter of respondents indicate these issues as very or extremely challenging. Building codes and food safety were not far behind, with 38.9% and 39.4%, respectively.

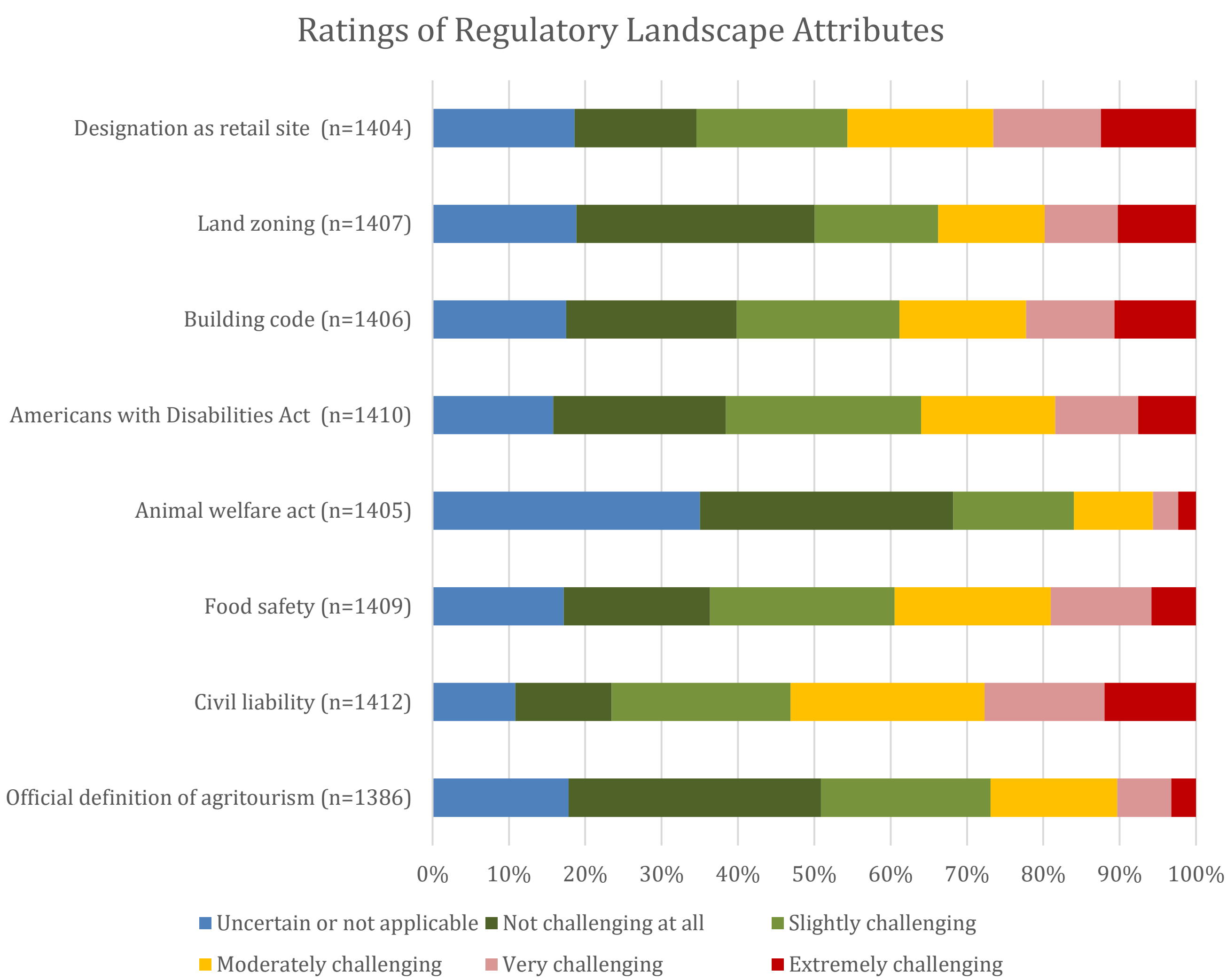

Figure 20 Distribution of respondent ratings of regulatory landscape attributes

What are agritourism operations' experiences and practices concerning regulations?

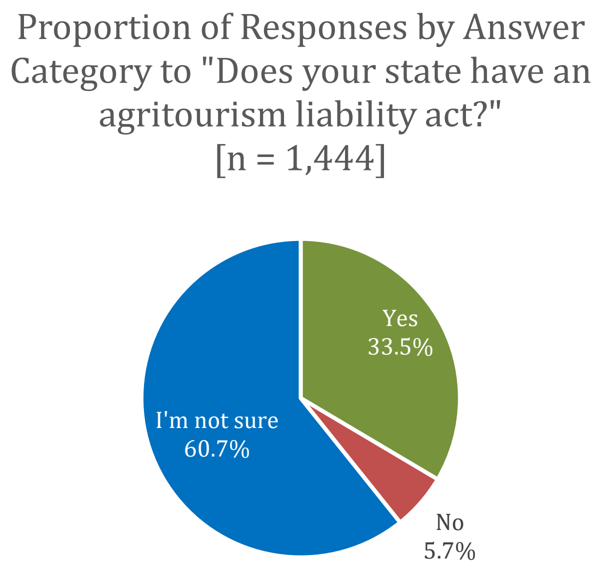

Figure 21 Does your state have an agritourism liability act?

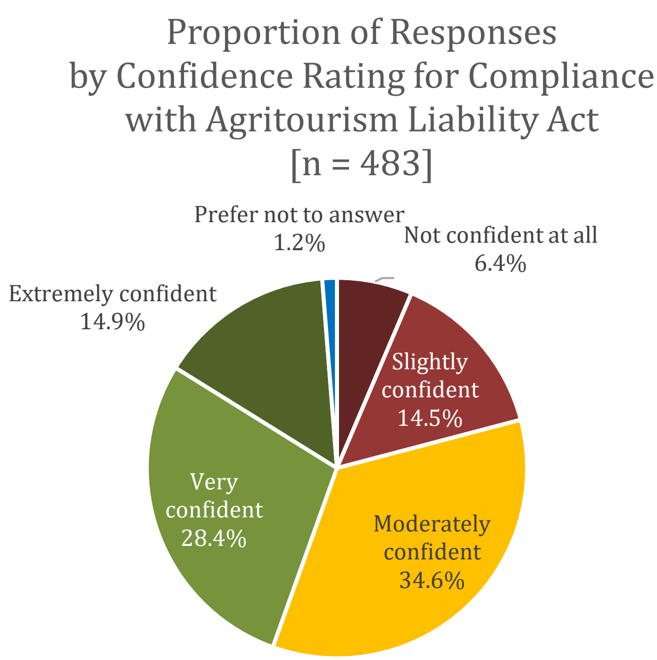

Figure 22 Confidence that farm has complied with requirements of local agritourism liability laws

After rating regulatory landscape attributes (recall Fig. 20), survey respondents were presented with questions designed to better understand their practices and business readiness on several of the key issues. This included civil liability (Figs. 21 to 24), compliance with zoning (Fig. 25) and other regulations relevant to their agritourism enterprise (Fig. 26), and experience of disputes (Figs. 27 to 29).

Most (60.7%) respondents indicated they are unaware ("I'm unsure") whether their state has an agritourism liability act in place (Fig. 21). Awareness of state liability laws is a topline indicator of agritourism operators' knowledge of critical legal protections and requirements in their risk environment. Welcoming the public into a space poses a risk of liability, which must be effectively managed. Most states have enacted statutory language limiting the liability of farms and/or their employees or providing defenses to liability claims from participants in agritourism activities. Pennsylvania and Vermont were the most recent states to add this law in 2021. Many statutes also require the business to take certain actions – such as posting a sign with designated language at specific points – to benefit from the law.

Respondents who believe their state has an agritourism liability act (n = 483), were then asked to rate their confidence that they are following it (Fig. 22). Of these, 43.3% are very or extremely confident they comply with the requirements. More than one-third (34.6%) are moderately confident of their compliance, and 20.9% are slightly or not at all confident of compliance.

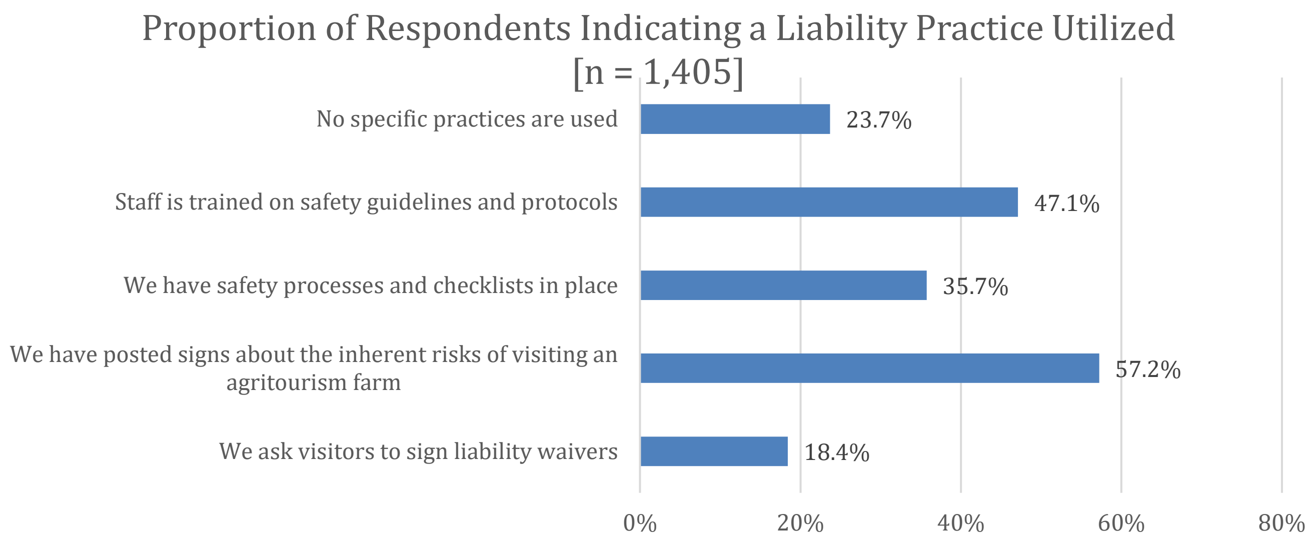

Figure 23 Liability practices utilized

Apart from direct legal protection to civil liability, farms can adopt practices to reduce or mitigate liability. Figure 23 presents data on the proportion of operators who indicated that they engage in each practice. Four practices were pre-populated in the survey questionnaire, along with an option to indicate that no specific practice is used on the farm and an option to write in free responses. While 23.7% responded that they do not use any specific practices, the most common practice used is the posting of warning signs. Visitors being asked to sign liability waivers was the least common practice, with 18.4% of sub-sample valid responses selecting this option. Slightly more than a third (35.7%) of respondents reported that their farms have implemented safety processes and checklists, while 47.1% have trained staff on safety guidelines and protocols. The posting of warning signs and signing of liability waivers are common requirements in many state agritourism liability acts to benefit from protection at the law.

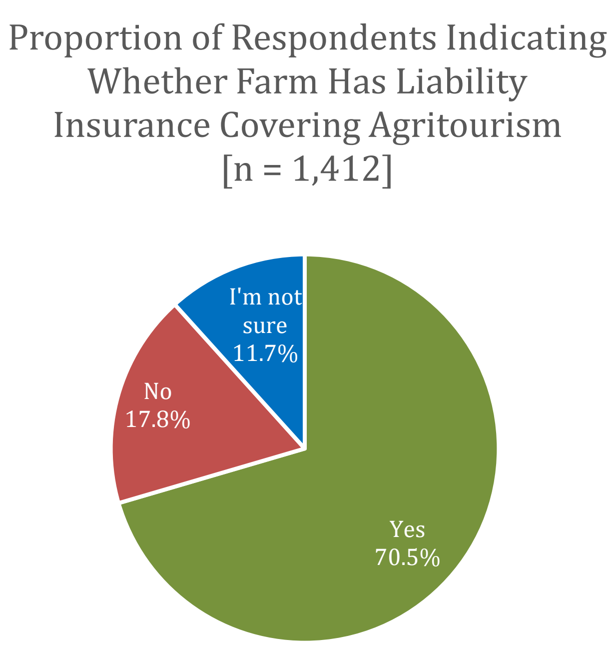

Figure 24 Farm has liability insurance covering agritourism?

In a separate question, respondents were asked about another risk management practice: carrying an insurance policy with liability coverage for the agritourism operation (Fig. 24). This may be a special rider insurance policy with an additional premium to cover the specific types of activities offered by the farm. Of the 1,412 valid responses to this question, 70.5% indicated that yes, they have liability insurance that specifically covers the agritourism operation. A smaller proportion (17.8%) said they do not have such insurance coverage, and 11.7% were uncertain if they had coverage or if their coverage covered agritourism. These proportions are notable given the implications for farm risk management, especially if sole proprietorships.

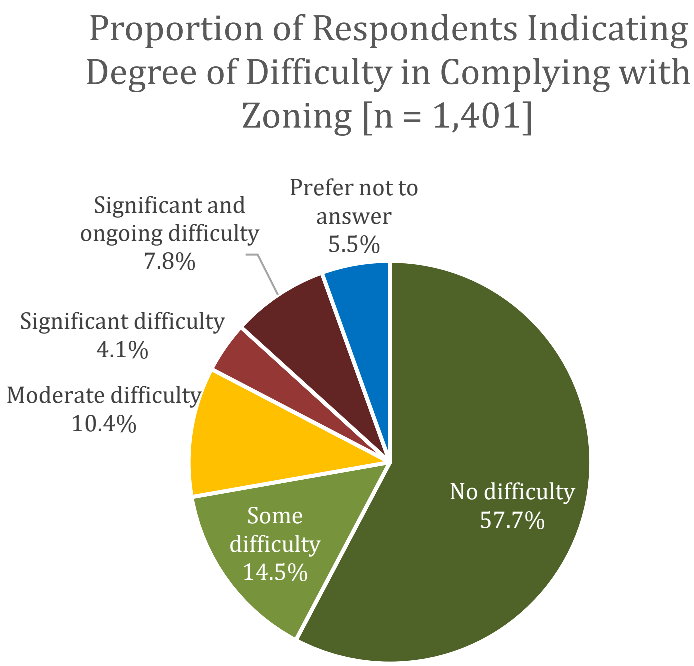

Figure 25 Degree of difficulty in complying with zoning

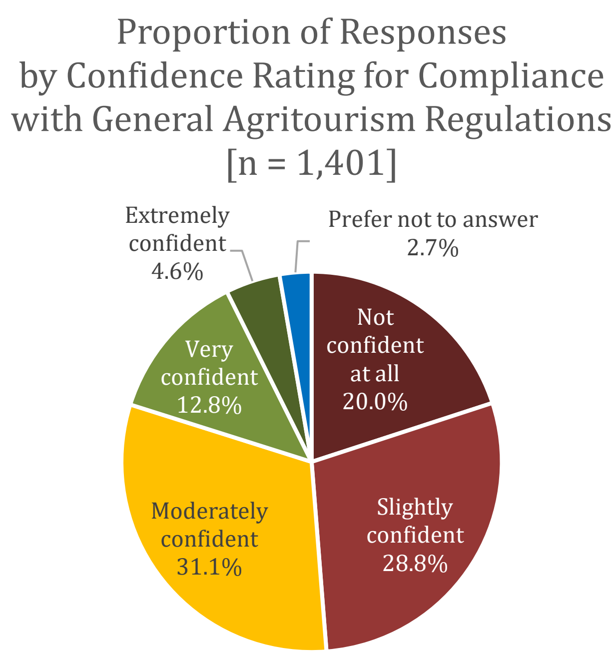

Figure 26 How confident are you that you are in compliance with agritourism regulations?

Compliance with zoning regulations may also be challenging for agritourism operations, particularly if farms are in areas of increasing urban sprawl or when zoning laws create specific conditions that must be met to host certain activities. Thus, the survey asked participants to rate their experience with zoning compliance (Fig. 25). Of the 1,401 valid responses, 57.7% indicated they have had no difficulty and 14.5% reported having had "some difficulty" – the lowest possible rating categories. However, 11.9% indicated they have had significant difficulty, including 7.8%, for whom difficulty in complying with zoning laws is ongoing. Some 5.6% preferred not to answer this question.

Given the variation in regulatory issues across jurisdictions, the survey also posed a catch-all question to understand agritourism operators' confidence in their general knowledge and compliance with agritourism regulations applicable to their business. Figure 26 reports the distribution of ratings among the 1,401 valid observations. In the generalized context, findings indicate producers lack confidence that they know about and have complied with applicable regulations; 20% indicated they were not at all confident, and 28.8% indicated they felt only slightly confident. Additionally, 31.1% indicated they were moderately confident. The implication is that much work can be done with agritourism operators to improve their knowledge and connect them with resources to invest in greater compliance.

Disputes with various parties – regulators, zoning boards, neighbors, employees, customers, etc. – may arise amid any business activities. Agritourism operations may experience such disputes over impacts on communities, disgruntled customers, differences in understanding of legal and regulatory issues, the boundaries of property, and more. Survey respondents were asked, "relating to your agritourism operation, have you experienced significant disputes where you or the other party has suggested legal action or litigation?" (Fig. 27). Among the 1,379 valid responses, 85% indicated they had not experienced such significant disputes. Approximately 2% were either unsure or preferred not to answer, while 11% indicated yes, their agritourism operation has experienced at least one significant dispute.

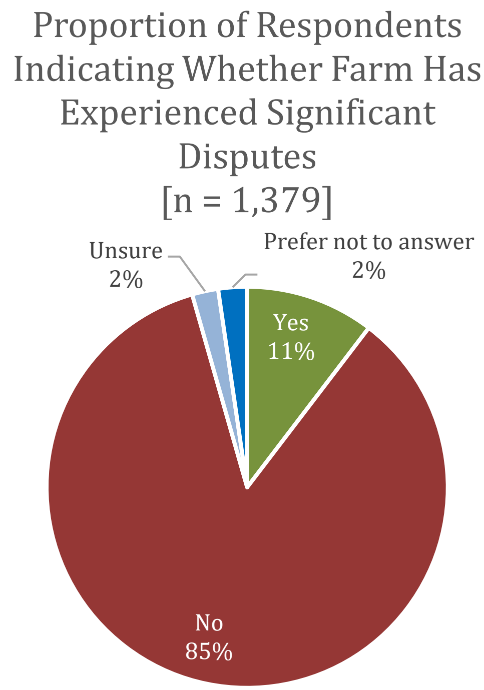

Figure 27 Experienced significant disputes related to their agritourism enterprise?

Respondents were also asked which types of disputes they had experienced (Fig. 28). Five pre-populated options were provided for selection, along with the choice to indicate no disputes were encountered, that they preferred not to answer, and to provide a free response. Most respondents (73%) reported they had not experienced any disputes, and 3% indicated they preferred not to answer. Figure 25 reports the dispute types most commonly encountered. Conflicts with neighbors were reported with the greatest frequency among the respondents, including those over issues such as noise, smells, or traffic (10.7%), and participant (i.e., customers or visitors) disputes were the next most common (6.6%). In addition to the dispute types shown in Figure 28, other types were reported in the free response area, such as those related to livestock or farm animals (e.g., animals leaving farm property or neighbors harassing animals over property line) and those with community groups (e.g., neighboring HOAs) over land-use practices.

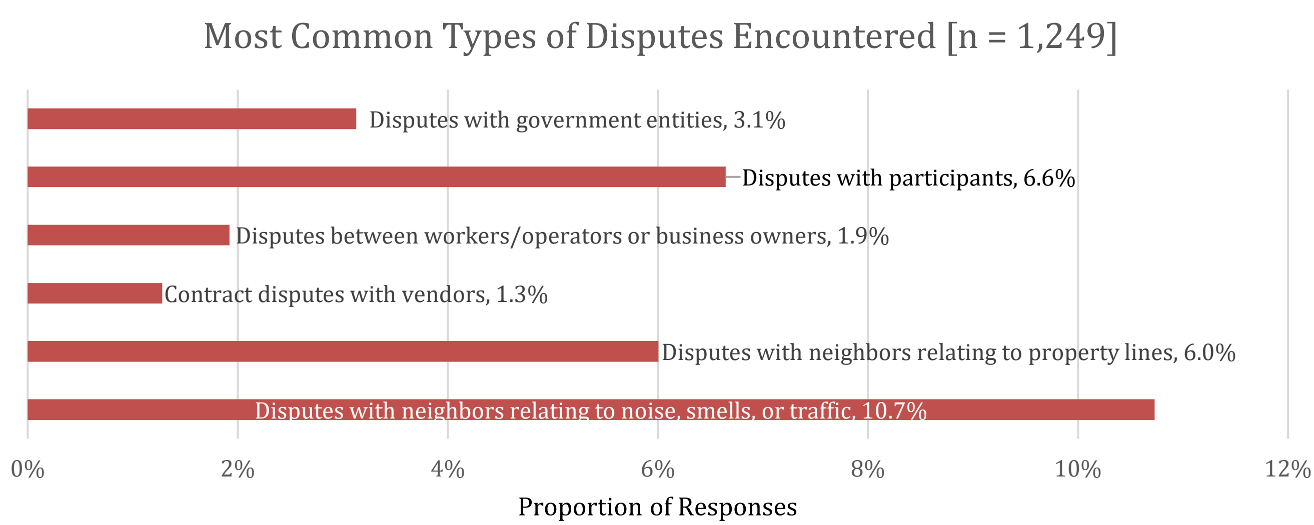

Figure 28 Type of dispute(s) experienced

The 143 respondents who indicated that their farm had experienced a significant dispute where they or the other party suggested legal action were also asked if they had participated in their state's agricultural mediation program. Agricultural mediation – sometimes called USDA certified mediation – is a voluntary process that can help resolve disputes related to agritourism and agricultural issues. The process is guided by a trained mediator, who creates a collaborative and confidential environment where parties can openly communicate and work together toward mutually agreeable solutions. The goal is to avoid litigation, and mediation is often quicker and more cost-effective, making it a practical choice for preserving relationships and addressing conflicts. In the U.S., 44 states offer mediation services[1]. The contact information can be found on the Coalition of Agriculture Mediation Program website.

We asked eligible respondents about their knowledge and use of mediation services following a dispute. A total of 135 respondents who reported experiencing a dispute engaged in this question (Fig. 29). Of these 73% were unaware of mediation services, and only 6% participated in such services. Additionally, 10% of respondents indicated that while they were aware of mediation services, they felt it was not a suitable option for their situation. Not all disputes are conducive to mediation.

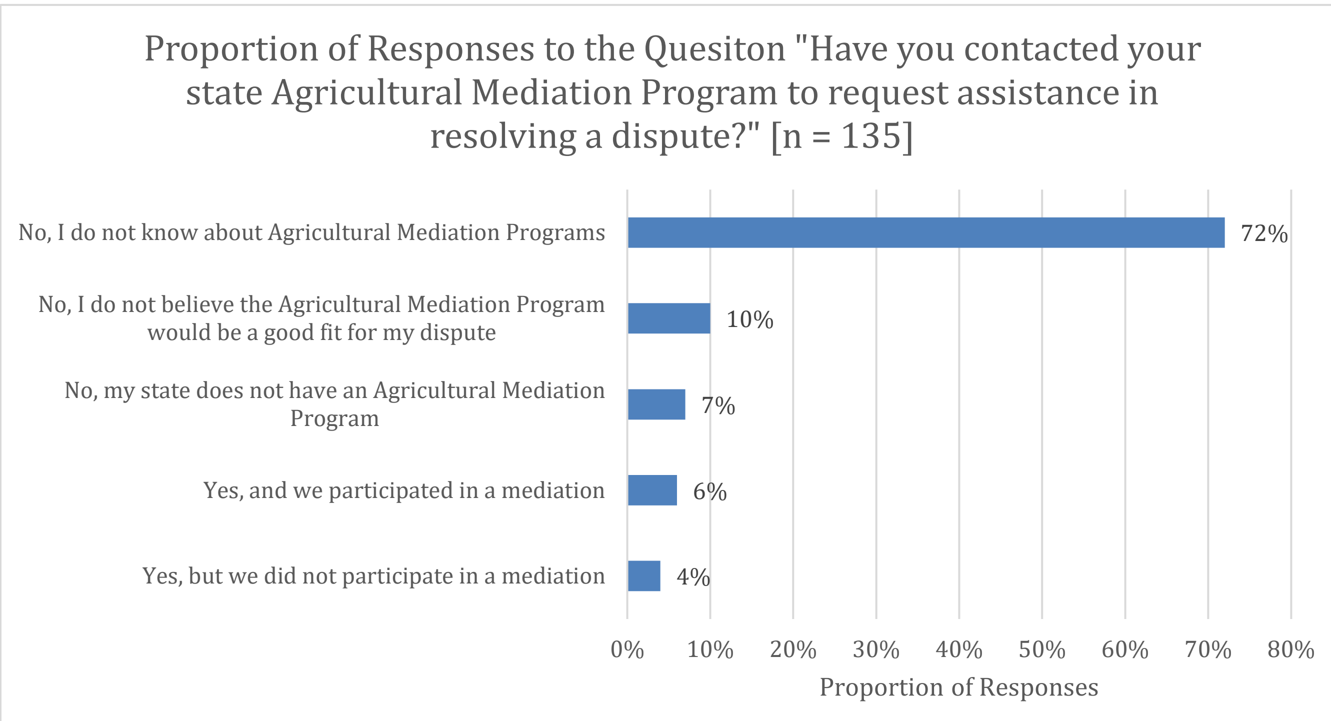

Figure 29 Have you contacted your state Agricultural Mediation Program to request assistance in resolving a dispute?

The structure of the survey limited the pool of respondents who were presented this question. However, among those who did engage, preliminary data indicate that better integration of state Agriculture Mediation Programs with agritourism audiences is warranted, including efforts that increase awareness among agritourism operators. Increased use of the program by agritourism operations may reduce costs associated with litigation or continued losses to businesses stemming from dispute actions.

[1] Arizona, Kentucky, Nevada, South Carolina, Tennessee, and West Virginia do not have AMP programs.

What support organizations and programming interest agritourism operators?

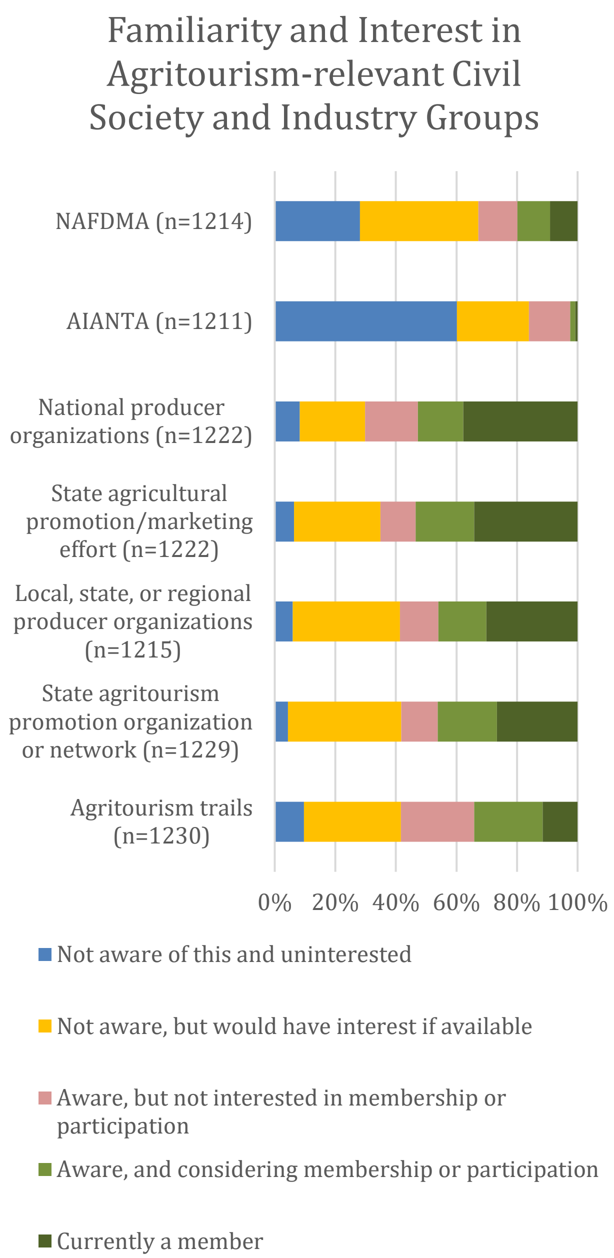

Figure 30 Distribution of respondent ratings of familiarity and interest in agritourism-relevant civil society and industry groups

Various organizations and agencies exist within the agritourism support ecosystem that provide aid in developing agritourism enterprises and destinations. The support these organizations provide may include educational training and technical assistance, collective marketing and branding activities, policy advocacy, event and destination coordination, and more. To help understand how agritourism operations might access support networks, the survey asked respondents to rate their familiarity and interest in these civil society and industry groups on a combined scale. Figure 30 presents the distribution of responses across these rating categories for two specific organizations and five generic organization types. The specific organizations are the North American Farmers Direct Marketing Organization (NAFDMA), an international agritourism association, and the American Indian Alaska Native Tourism Association (AIANTA). These national organizations were included separately as they supported survey distribution to their members. A total of 1,211 respondents provided at least one rating for the organizations included in the question.

Agritourism operations are most frequently (37.7%) current members of national producer organizations – such as the Farm Bureau Federation, National Farmers Union, or Grange. This is followed closely by state agricultural promotion or marketing efforts (e.g. *Florida Grown* or *Real Maine*) at 34.1% and local, state, or regional producer organizations at 30.1%. Roughly similar proportions indicated they are not aware of but would have interest in participating in NAFDMA (39%); a state agritourism promotion organization or network (28.5%); or a local, state, or regional producer organization (35.4%) if available. Sizeable proportions also indicated awareness and active consideration of membership in state-level promotional efforts. Utilizing the organizations noted to reach current members for agritourism support provision holds immediate promise, as does assisting producers in connecting with or founding them in regions where they do not exist.

Figure 30 also provides data on operators' perspectives on a growing tool for agritourism-focused destination management and promotion – the local agritourism "trail". Most known among the wine-making and vineyard industry ("wine trails"), both sector-specific and diversified sector trails have emerged across the U.S. and abroad. Among the sub-sample, only 11.5% of respondents indicated they are current members of trails. Still, respondents indicated some interest in membership, either that they are currently unaware of a trail in their region but would have interest if available (32%) or that they are aware of a regional trail and actively considering membership (22.6%). Intriguingly, 33.9% indicated they have no interest in agritourism trails, including nearly one-quarter (24.2%) who are aware of one in their region but not interested in joining.

What types of support can these and other organizations – such as the Cooperative Extension services at Land-Grant Universities – provide that many agritourism operators would find helpful? Results of the survey provide insight to this question, shown in Figure 31. Unsurprisingly, given findings previously presented in Figure 17, financial assistance is the most frequently indicated with 75.6% of the 1,185 valid responses selecting this option. This is followed by marketing assistance (65.8%), policy advocacy (61.7%), technical assistance (62.1%), and help with legal issues (60.3%) all with relatively similar proportions of interest. The least selected type – although still indicated by a majority of respondents – was help networking and the coordination of events.

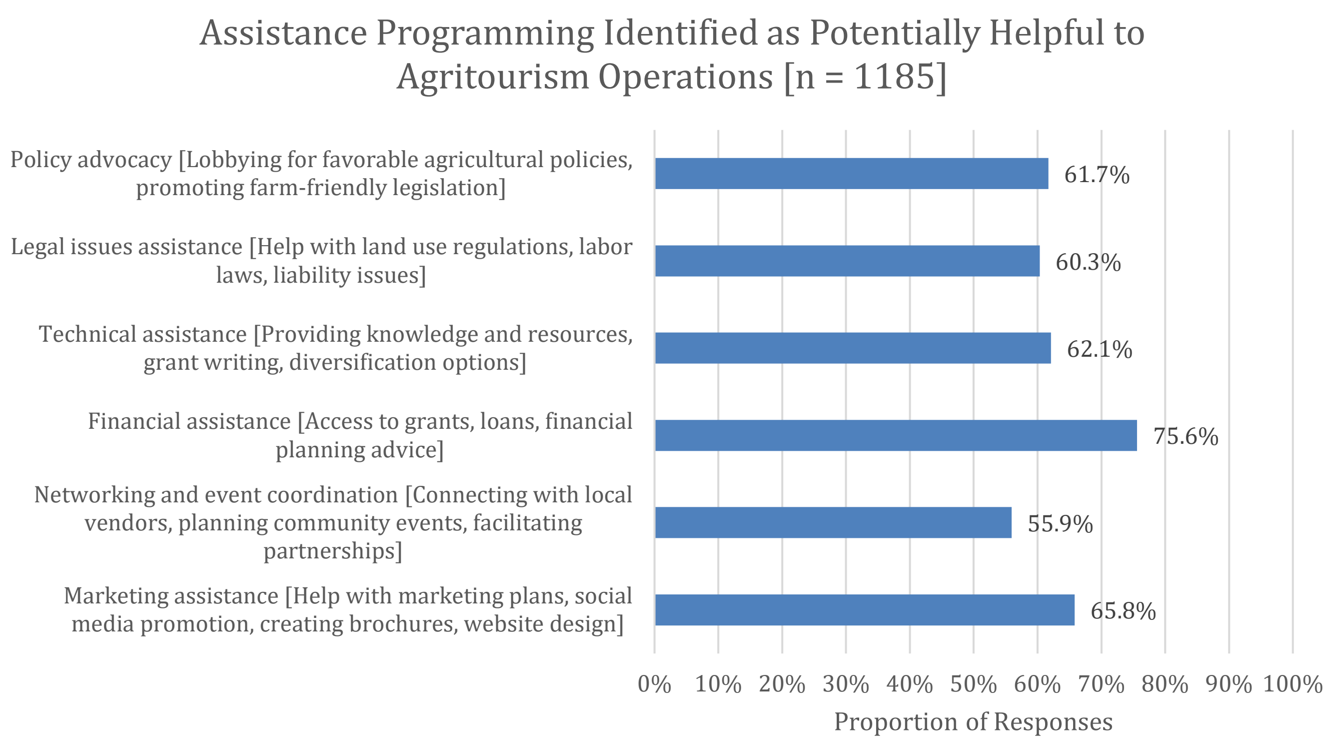

Figure 31 Type(s) of assistance that would be helpful in developing agritourism enterprise

Similarly, respondents were asked what types of financial programs they engaged in during 2023 to support the development of their agritourism enterprises. Figure 32 depicts the proportion of the 1,210 responses provided selecting different options. Overwhelmingly, operators indicated they did not receive any grants or loans in 2023 (66.4%) and some 31.6% also indicated they were not aware of any grants or loans being available to support their agritourism business. Those who did engage in financial support programs were much less frequent, with 12.8% indicating they received grants, 5.4% obtaining loans and roughly equal proportions receiving donations via fundraising (3.9%) or in-kind technical assistance or marketing dollars (3.2%).

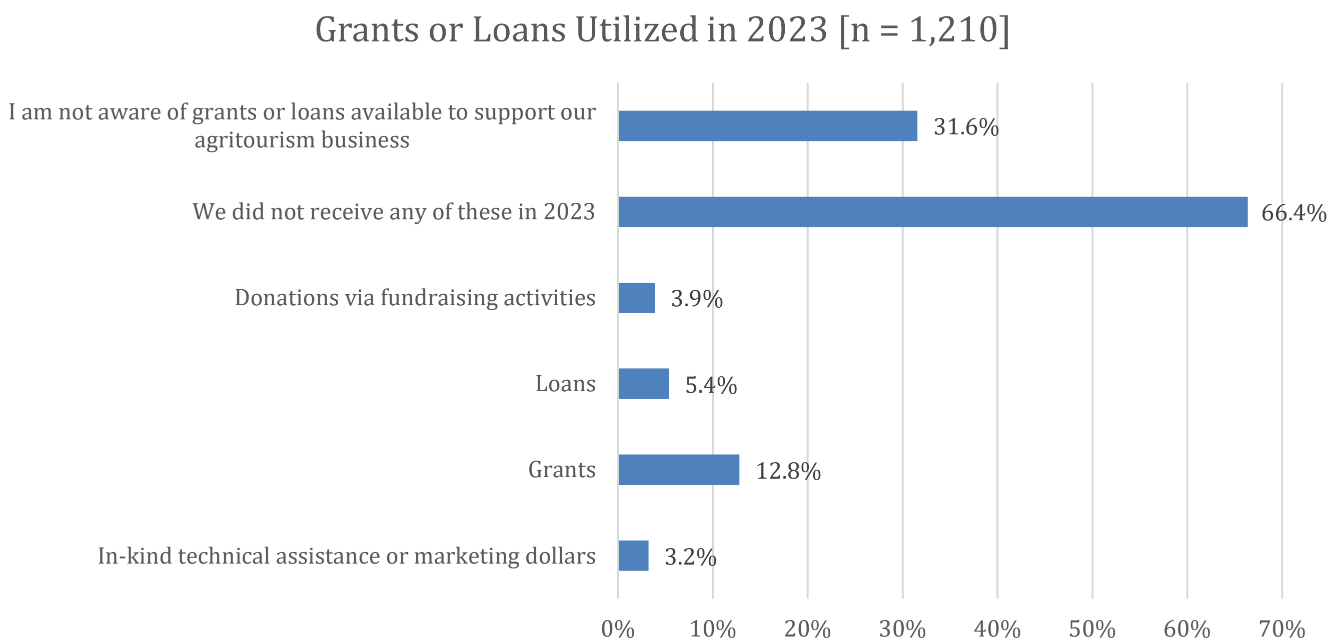

Figure 32 Type of financial supports utilized in 2023

How do operators view the future of agritourism?

Despite challenges and barriers, agritourism operators have a generally positive view of agritourism's future (Fig. 33). When asked to rate three aspects of the future (in five years), 75.1% of operators felt visitors to their operation would increase moderately or significantly, 72.3% felt that way about their operation's profitability, and 68.4% felt they would expand the number of agritourism activities or initiatives on their farm moderately or significantly. For all three future orientation items, less than 9% of respondents expected these to decrease at all.

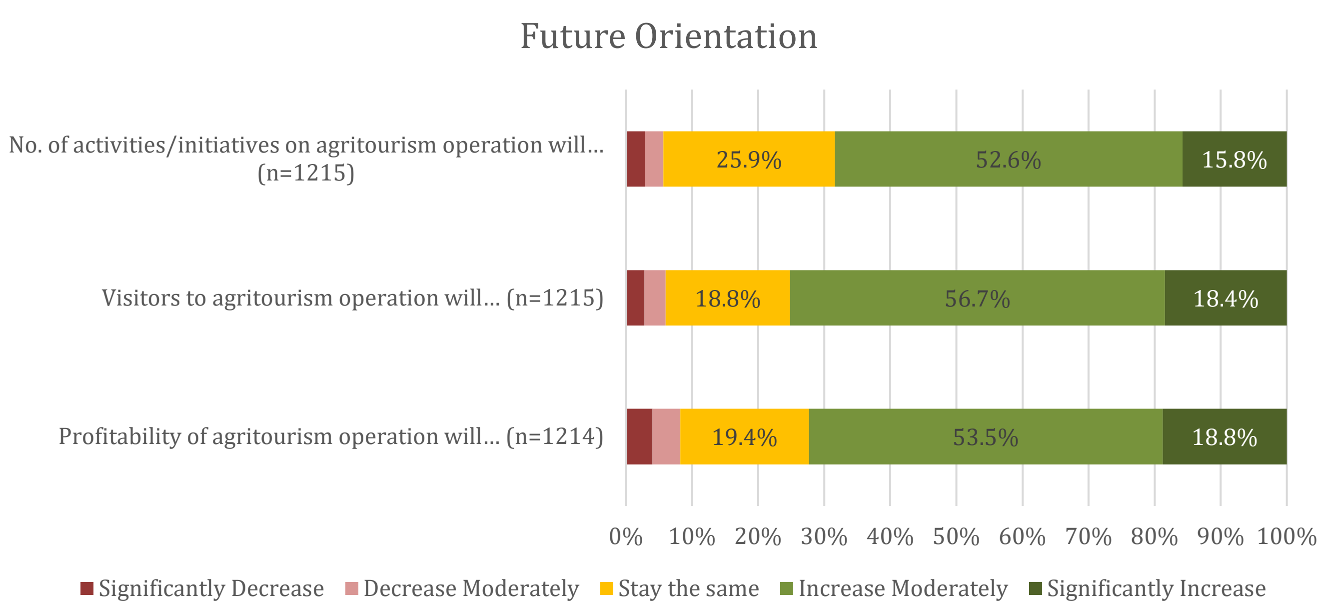

Figure 33 Distribution of respondent ratings of the future orientation of their agritourism enterprises

Conclusion and recommendations

Agritourism presents a promising yet underutilized opportunity for farmers to diversify income streams and strengthen rural economies. The results of the 2024 National Agritourism Producer Survey reveal that while many farms actively engage in agritourism, significant barriers prevent its full potential from being realized. Key challenges include issues with understanding regulatory requirements, limited access to financial resources, inadequate infrastructure, and gaps in social capital among agritourism operators.

The survey highlights that a substantial proportion of agritourism operators struggle with profitability, and many lack the necessary financial, regulatory, marketing, and technical support to succeed. Additionally, weak communication networks among producers and minimal engagement in regional agritourism collaborations hinder the development of robust agritourism ecosystems.

Recommendations for Stakeholders

To address these challenges and support the growth of agritourism, we recommend the following actions for local and regional policymakers, researchers, service providers, and industry leaders:

- **Enhance Regulatory Guidance**: Offer educational workshops and legal consultations for local policy and decision makers and agritourism support providers to improve support for agritourism entrepreneurship. Educate agritourism operators to strengthen compliance with agritourism-related regulations, such as liability laws, food safety requirements, and building codes.
- **Increase Financial and Marketing Support**: Provide targeted financial aid programs, grants, and low-interest loans to help agritourism entrepreneurs to scale their agritourism businesses. Develop accessible marketing resources to assist farms in promoting their offerings to broader audiences.
- **Strengthen Social Capital**: Facilitate the creation of regional agritourism networks and producer organizations to improve communication, encourage collaboration, and promote regional branding efforts. Extension programs can facilitate these connections by hosting workshops and networking events.
- **Focus on Policy Advocacy**: Engage stakeholders in lobbying for state and federal support for agritourism development. Policy changes can improve access to funding, reduce bureaucratic hurdles, and create a more favorable operating environment for agritourism businesses.

Next Steps for Research

Further studies should focus on understanding regional disparities in regulatory frameworks and their impact on agritourism enterprises. Research could also explore strategies to build stronger communication networks and foster cooperative efforts among producers. Tracking local and regional agritourism's long-term economic and community impacts would also support funding and resource requests.

Further reading and resources

Agritourism in the United States - State & National Factsheets Using Data from the 2022 U.S. Census of Agriculture: https://aese.psu.edu/outreach/agritourism/projects/nifa-agritourism/state-factsheets

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