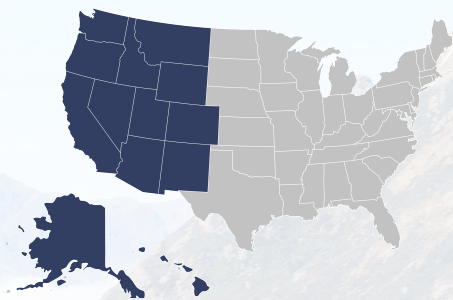


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Insights on Agritourism Among Producers in Western US States: Evidence from the 2024 National Agritourism Producer Survey

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Introduction

Agritourism and direct-to-consumer (DTC) sales have gained increased focus within the agricultural landscape of the U.S., offering economic benefits and opportunities for diversification (Schmidt et al., 2022). While the 2022 Census of Agriculture addresses agritourism and recreational services separately from DTC, we define agritourism following Chase et al. (2018) and include income from sources that fall under USDA's definition as agritourism and recreational services – a type of “farm-related” income – as well as product sales made directly to consumers on-farm.

Our recent analysis of Census of Agriculture data found that in the U.S. the number of agricultural operations reporting earnings from agritourism or recreational services has remained relatively stable since 2017. Across the Western region – comprised of Alaska, Arizona, California, Colorado, Hawai'i, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, and Washington – the 2022 Census of Agriculture estimated 5,515 agricultural operations with income from agritourism and recreational services (excluding DTC), a 5.4% decline from 2017. Figure 1 presents the USDA-estimated number of agritourism and recreational services operations by county across the region. California has the greatest

Number of Farm Operations with Income from Agritourism and Recreational Services, 2022

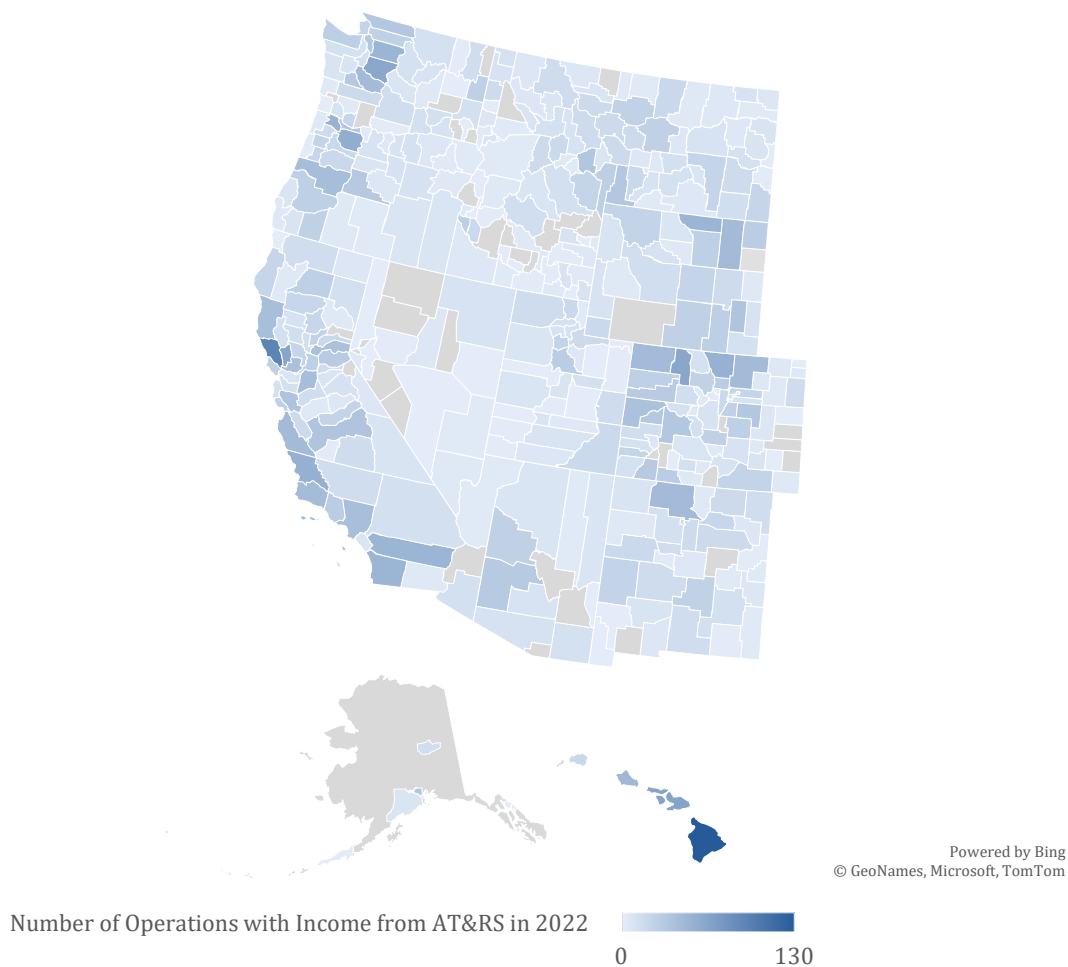


Figure 1 Number of agritourism operations by county in 2022

total number of estimated farms with agritourism and recreational services receipts in the region, based on 2022 census data, while Alaska has the greatest proportion – 4.9% – of farms engaged in agritourism. The largest total concentrations of agritourism operations in the region are found in Hawai'i (the Big Island) and Maui Counties in Hawai'i, Sonoma and Napa Counties in California (i.e. Wine Country), and Routt County in Colorado. Notably, county-level data indicates clusters of agritourism operations in spaces adjacent to metropolitan areas of Seattle, Portland, the San Francisco Bay, Denver, Albuquerque, and Phoenix.

USDA estimates for 2022 indicate agritourism and recreation services generated \$362 million in receipts for Western farms, accounting for 7.9% of total non-product sales (i.e. “farm-related”) revenue. Agritourism makes up a substantial portion of non-product farm-related revenue in Alaska (56.6%), Hawai'i (36%), and Wyoming (21.7%).

Between 2017 and 2022, collective receipts on Western farms from agritourism and recreation services decreased 3.3% after adjusting for inflation. Change over the five-year period in total agritourism and recreational services receipts was not uniform across the region, however. After adjusting for inflation, Nevada saw a 109% increase from 2017 to 2022 in agritourism receipts – the largest absolute change – while Alaska experiences a decline of 52%.

On average, Western agritourism operations earned \$65,672 in gross revenue from offering these services in 2022. Importantly, this economic contribution to the average farm's receipts varies by state, from as low as \$37,680 in tourism-related receipts on the average agritourism operation in Oregon to \$101,579 to the average California agritourism enterprise.

Number of Farm Operations with Income from Direct-to-Consumer Sales, 2022

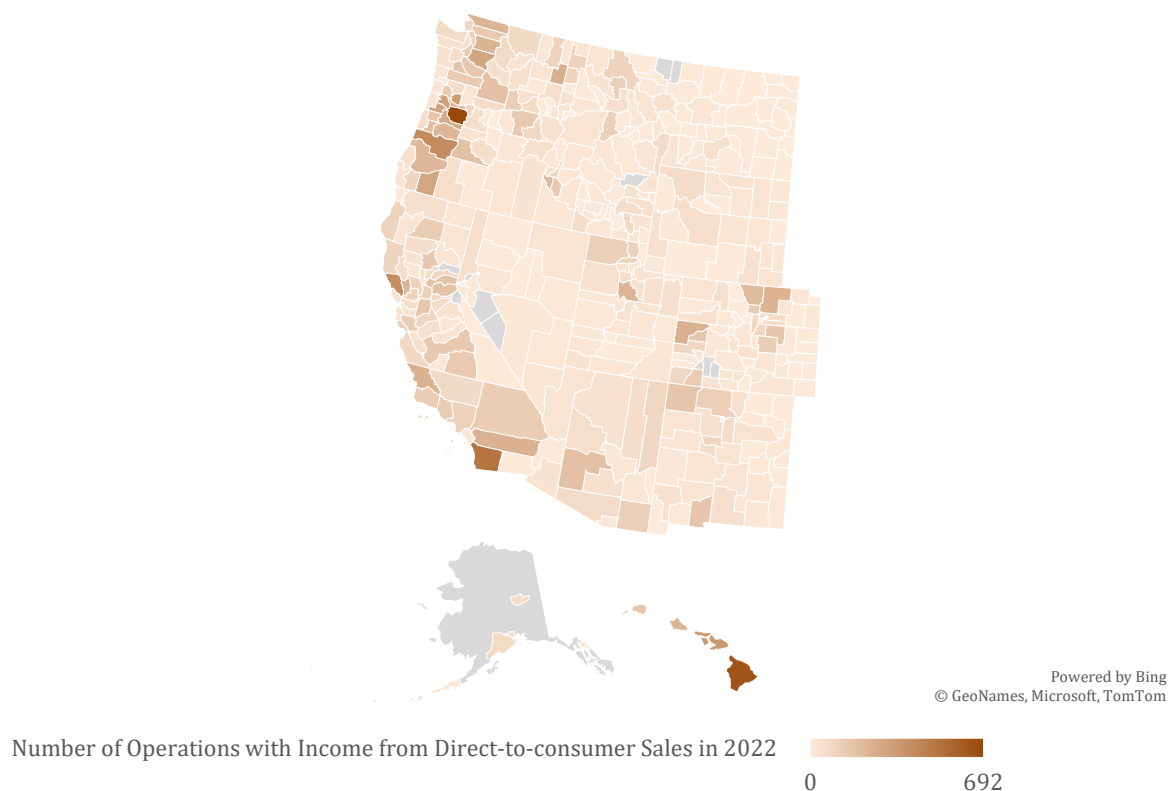


Figure 2 Number of Direct-to-Consumer Sales operations by county in 2022

Nationally, both the total number and proportion of farms engaging in DTC channels has decreased from 2017 to 2022. Across the U.S. these DTC sales are predominantly driven by small-scale farms, with 81.2% of American farms selling directly to consumers in 2022 earning below \$50,000 in gross receipts and 67.4% operating on less than 50 acres (Entsminger and Schmidt, 2024a,b).

Similar patterns are seen in the Western U.S., where the estimated number of farms with DTC sales receipts declined 22.1%, from 30,031 farms in 2017 to 23,407 in 2022 across the 11 states. Figure 2 presents the USDA-estimated number of Western farms with DTC sales revenue in 2022 by county. Similar clusters noted in discussion of Figure 1 for agritourism and recreational services operations are also seen in data on DTC sales operations. With DTC, however, Clackamas County in Oregon – in the fertile lands that lie between Portland and the Warm Springs Reservation – has the largest total concentration of (692) DTC-selling farm operations. This is followed by Hawai'i and Sonoma counties noted earlier for agritourism operations data, along with San Diego County in California and Lane County in Oregon. States in the region with the highest proportion of all farms engaged in DTC channels include Hawai'i (20.8%), Alaska (18.8%), and Oregon (11.1%).

Unsurprisingly, these three states also have the highest proportions of all farm product sales attributable to DTC channels (6.4%, 3.7%, and 1.7%, respectively). Western region farms sold \$1.28 billion worth of products via DTC channels in 2022, a 4.1% decline over 2017, adjusted for inflation. On a state basis, some jurisdictions experienced much more severe declines, such as Nevada which experienced a 76% decline over the five-year period in inflation-adjusted value of DTC sales value. Meanwhile other states in the region experienced increases, after adjusting for inflation, such as Montana who had the largest proportional rise in DTC sales value in the West, at 33%. The average Western U.S. farm selling DTC received \$54,722 via outlets like farm stores, roadside stands, Community-supported Agriculture subscriptions (CSAs), and farmers' markets in 2022. As with agritourism receipts, the average DTC sales value per farm varies by state – from as low as roughly \$9,000 in New Mexico and Wyoming to as high as \$174,918 in California. Nevada experienced the largest decline in per farm DTC sales value (-70%) while Montana saw the largest increase (65%). Powerhouses of California and Oregon both experienced increases of 42% and 44% in per farm average DTC sales value after adjusting for inflation.

Across the region, only 8% of farms sell directly to consumers (DTC) and only 1.8% engage in additional agritourism and recreational services, suggesting untapped potential. Unfortunately, Federal census data is unable to provide a more detailed picture of on-farm DTC sales – a critical part of agritourism revenue models – and how this integrates with other agritourism and recreational services activities that hold marketing and revenue generation functions. For the Western U.S., this is of critical importance, given higher than average erosion of number of operations engaged and value obtained from these activities.

This report presents findings from the *2024 National Agritourism Producer Survey*, conducted in part to address the type of knowledge gaps just identified. The survey questionnaire was developed by Cooperative Extension researchers as part of a larger project aimed at defining and enhancing the agritourism support system in the United States. The primary objective was to identify areas where targeted interventions and programs can support agritourism development. Respondents were asked to evaluate factors that impact their agritourism business. This included rating perceived challenges in the business environment, tourism features of their local region, the socio-cultural environment in which they operate, and their views on the regulatory landscape for agritourism. The online survey was open from March through August 2024, and 2,139 agritourism operators across the United States responded. A total of 136 survey participants identified themselves as being in a Western region states by reporting the postal (ZIP) code of their farm.

Where are responding agritourism operations located?

Agricultural producers responding to the survey were in both metropolitan and rural (non-metro) counties across the country (Schmidt et al., 2025). Based on ZIP code information provided by respondents, we identified their county. USDA’s Rural-Urban Continuum Codes allow us to classify these counties, where respondent farms are located, into categories that represent population size and urbanicity/remoteness. A majority (82.3%) of responding Western agritourism operations are located in metropolitan counties. An additional 8.1% are in rural counties which abut a metropolitan-designated zone. The remaining 9.5% of the respondents are in “remote” non-metro counties – the most rural types in the RUCC classification scheme.

While these results mirror data for the national total sample – with many agritourism enterprises occurring within relatively easy travel from a town, city, or major metro – in the Western region there is a substantially greater proportion in the most metropolitan counties. This may be a factor of Western geography where much larger and more expansive counties incorporate greater proportions of rurality and farmland, whereas in the East smaller county size may allow rural communities to be in separate jurisdictions from large metro areas. However, even in the East, data from this survey and other sources tends to indicate agritourism operations existing within peri-urban zones or within reasonable commuting distances to urban centers whether large metropolises or smaller cities and towns.

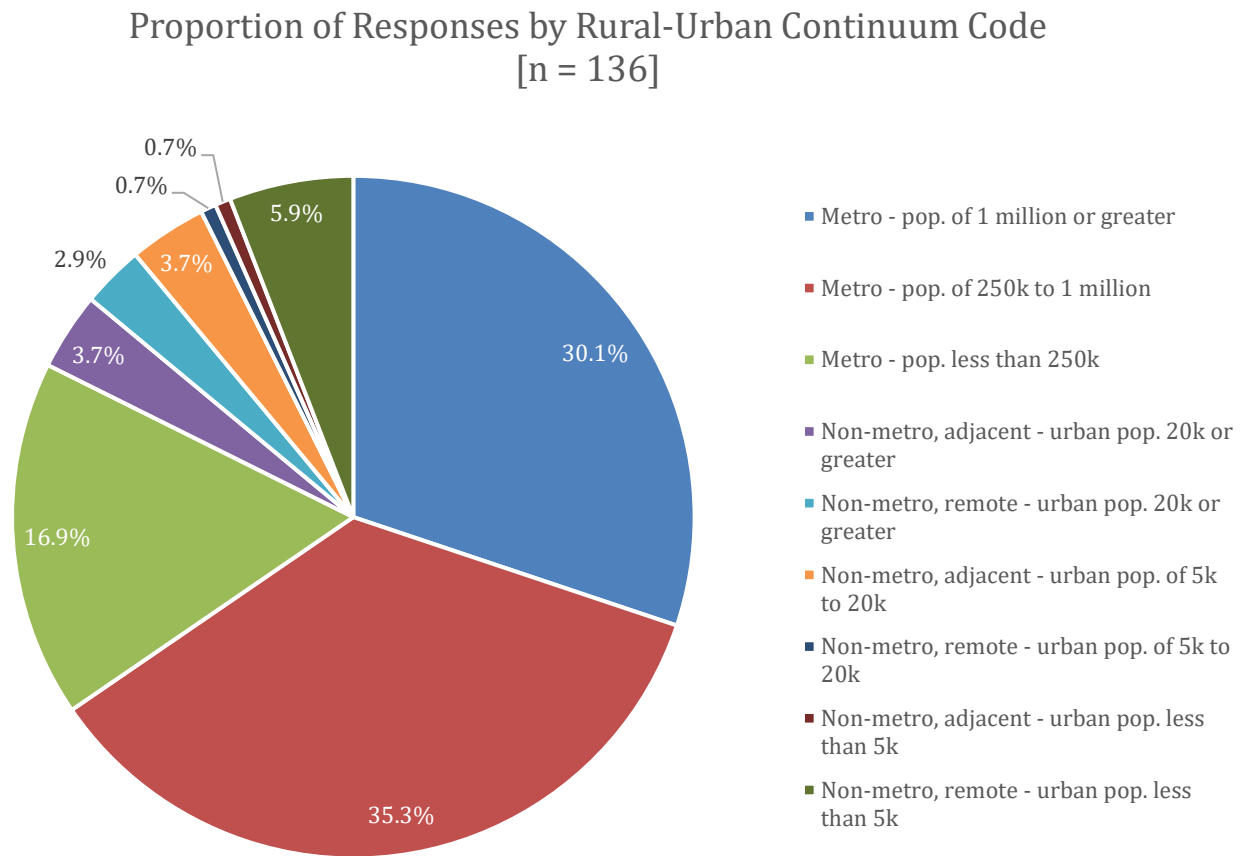
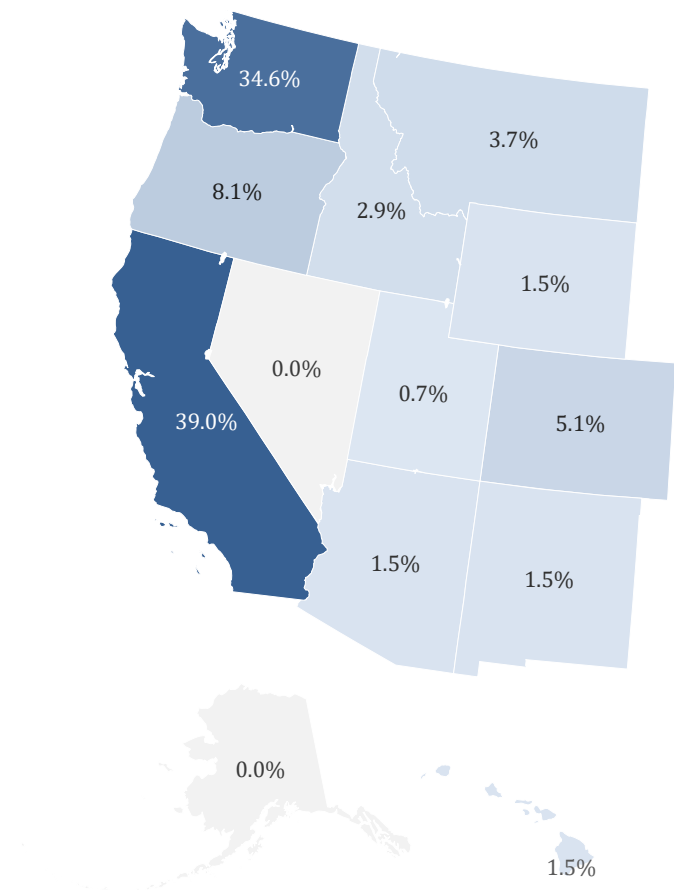


Figure 3 Community type by the Rural-Urban Continuum Code (RUCC) classification of counties

Proportion of Western Region Responses by State [n = 136]



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Figure 4 Location of responses from the Western U.S. region by state

In addition to knowing the types of communities in which agritourism enterprises exist, it is helpful to know where in geographic space they are located. Reporting these results must balance preserving the privacy of survey respondents with offering useful information for policy and decision-making. Therefore, we group responses by state for reporting here. Figure 4 presents the proportion of the 136 location-identifying respondents within the Western region originating from one of the region's 11 states. No respondents identified themselves as being located in Nevada or Alaska. While respondents from these two states may be within the wider national sample, those that chose not to identify their location when asked.

California, Washington, Oregon, and Colorado unsurprisingly make up the largest proportion of the regional sub-sample; these states have the greatest total USDA-estimated numbers of farms with DTC and/or agritourism and recreational services receipts. The data brief covering national data in this series (Schmidt et al., 2025) provides information on the proportion of the whole location-identified sample from each state. Notably, respondents identifying themselves as in the Western region account for 6.4% of the 2,139 total responses and 11.7% of the 1,158 responses that provided their location information. USDA's 2022 Census of Agriculture data estimates that 19.3% of farms with agritourism and recreational services receipts and 20% of those with DTC sales are in the Western U.S. Improving response rates among Western U.S. farms should be a priority for future non-Federal national agritourism research.

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 81% of the 128 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 6.3% with less than \$1,000 in sales and thus who may not qualify as a farm operation under certain Federal program definitions. An additional 15.7% would likely fall within the mid-sized farm category (\$350,000 to \$999,999 in sales), with another 8.6% categorized as large or very large operations with sales exceeding \$1 million. Compared to national-level survey results, Western farms tend to be larger in sales value terms, with a lower proportion of farms in the lowest three revenue categories.

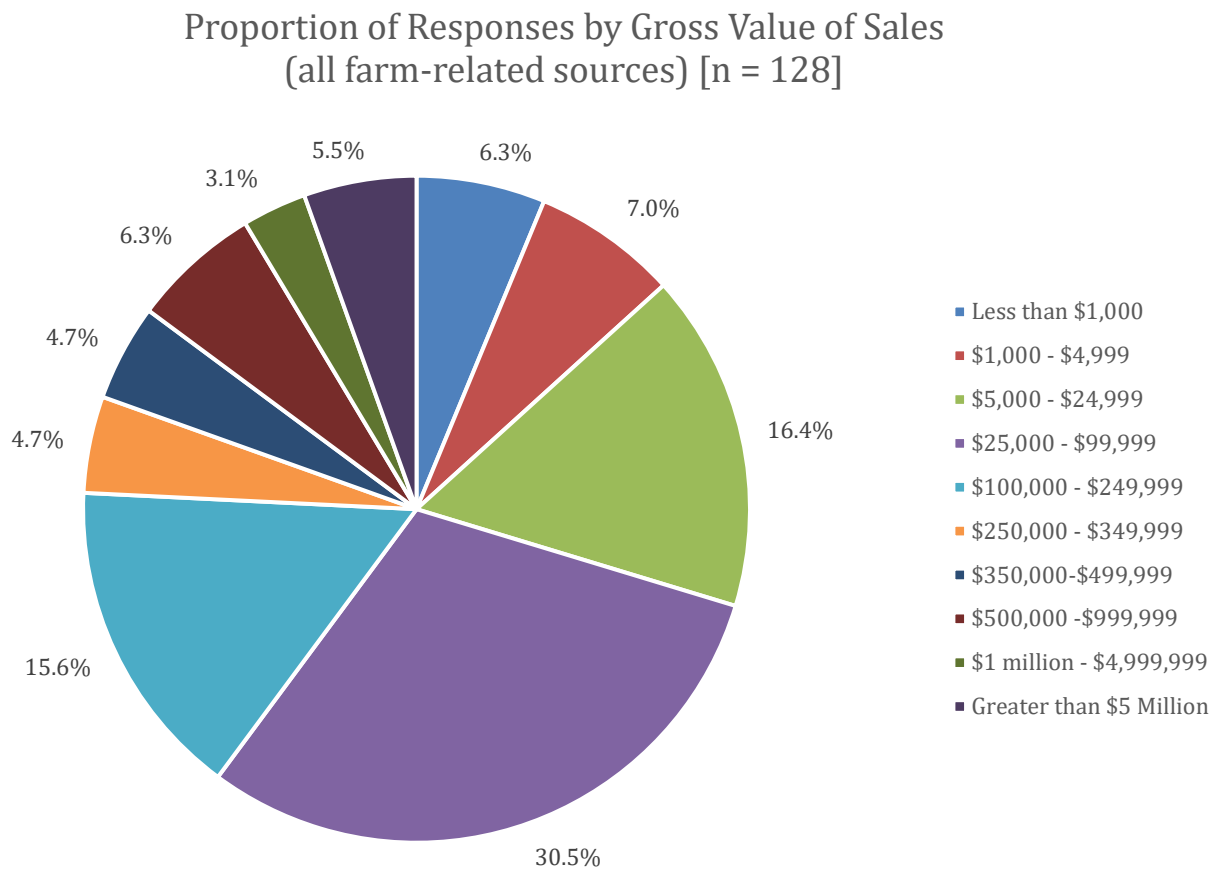


Figure 5 Gross sales from all farm-related sources in 2023

Proportion of Responses by Total Acreage in Operation [n = 134]

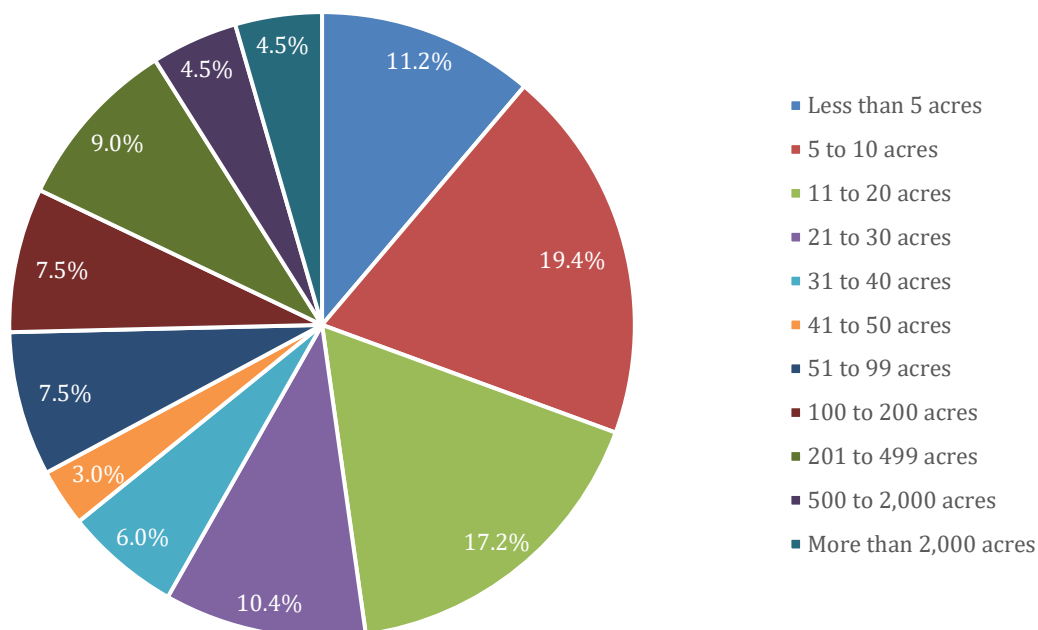


Figure 6 Total acreage reported in the operation for 2023

Proportion of Responses by Number of Farm Operators [n = 128]

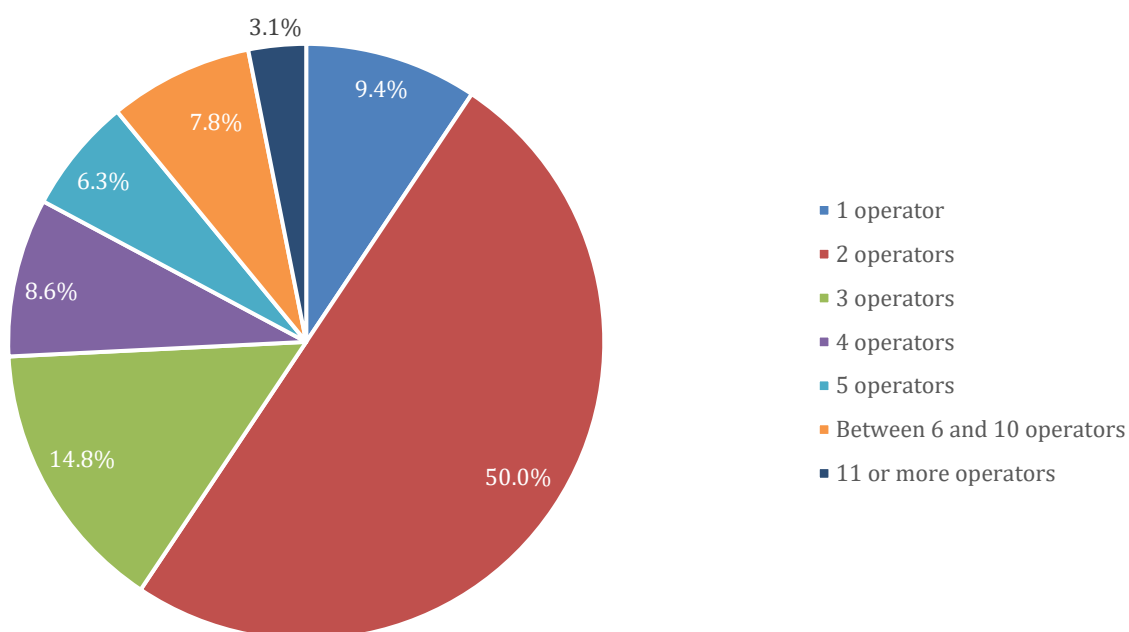


Figure 7 Number of farm operators making decisions for the operation in 2023

Category boundaries for farm size using land area and number of operators are not as well established. In the West, farms and ranches tend to be notably larger on average than those in the East and Midwest. Figure 6 reports 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. Roughly two-thirds (67.2%) of Western agritourism operations reported 50 acres or fewer available to them in 2023, a common benchmark for “small farms”. Some 24% reported between 51 and 499 acres, a common range for defining “mid-sized” operations, and 9% of the Western agritourism operations would likely be considered large farms by acreage, having 500 or more acres. Interestingly, when compared to survey national data, Western respondents tend to be operating smaller total acreages, with greater proportions of farms in the lower total acre categories. This is a departure from expectations for Western farms generally, indicating that among the Western states, agritourism may particularly be a diversification strategy among small-scale enterprises that may not be able to access conventional markets as easily.

Managerial and decision-making labor available on the farm can be an indicator of operational complexity and thus also 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 Western sub-sample of agritourism operators shows a similar proportion indicating the farm had two operators making decisions in 2023, at 50% of the 128 responses (Fig. 7). Compared to the survey’s nation-wide figures, the Western sub-sample had similar proportions of farms with one, three, and five or more operators. Thus, it appears agritourism operations rely on greater numbers of owner/operators making decisions, and 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 to attract 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, 135 and 134 survey participants engaged in these questionnaire sections, respectively.

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 are data for bakery, mushrooms, maple, and horses, donkeys, and other equine – items which no Western respondent selected. Responses indicate the most common products available from operations with agritourism enterprises: 62% grew fruits and vegetables in 2023; 54% had animals and animal-related products; 37% had nursery products, flowers, or Christmas trees; 30% offered value-added products (such as jams, pickles, sauces, cheese, or wine); and 27% were producing row or field crops (such as wheat, soy, or hay).

Most respondent farms have diversified production systems; 69.7% indicated more than one type of product is grown or made by the farm. Further, 48.5% 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 40 farms that reported value-added production, 80% also indicated fruits and vegetables and 65% also indicated animal products (including aquaculture and mariculture) present within the operation.

Proportion of Responses Indicating Production Type Present on Farm [n = 135]

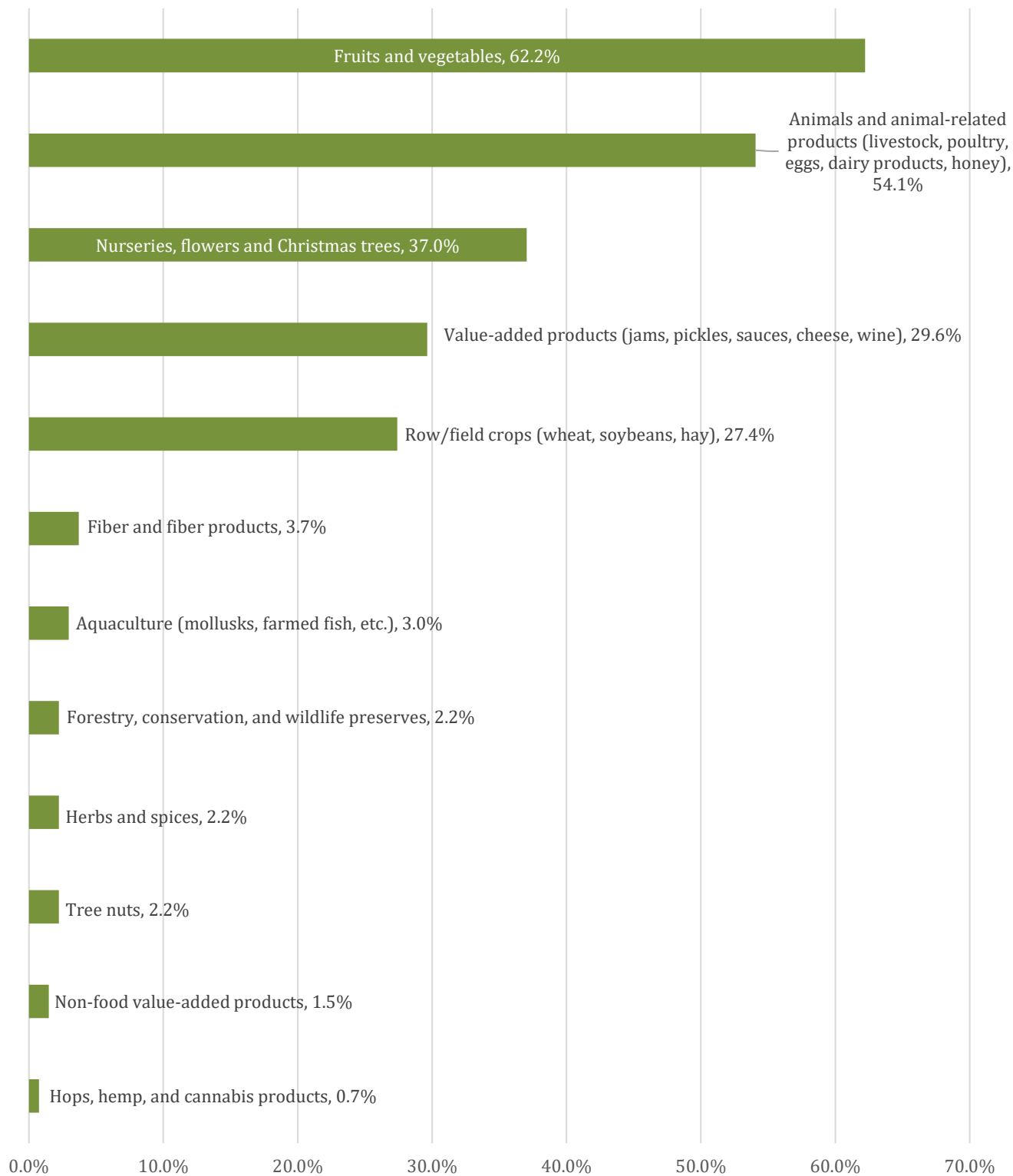


Figure 8 Type of production activity present on farm in 2023

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 134 responses indicating which experiences were 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 (Hollas et al., 2024). Off-farm direct sales were offered by 37.3% of respondents.

Results in our Western sub-sample, consistent with the national sample and other state and region sub-samples, indicate that the most common agritourism activity (66.4% of Western respondents) during 2023 was sales made directly to consumers on-farm via on-site stores or stands, Community Supported Agriculture subscription pick-up points, etc. The next most common activity (65.7%) was educational activities, such as tours or workshops. This was followed by events (44.8%) such as farm-to-table dinners and weddings, then by pick-your-own (34.3%). Versus the national whole-sample data, a larger proportion of Western U.S. agritourism enterprises reported accommodations and lodging (29% in the West, compared to just 19.6% nationally) and events (44.8% in the West, compared to just 35.9% nationally).

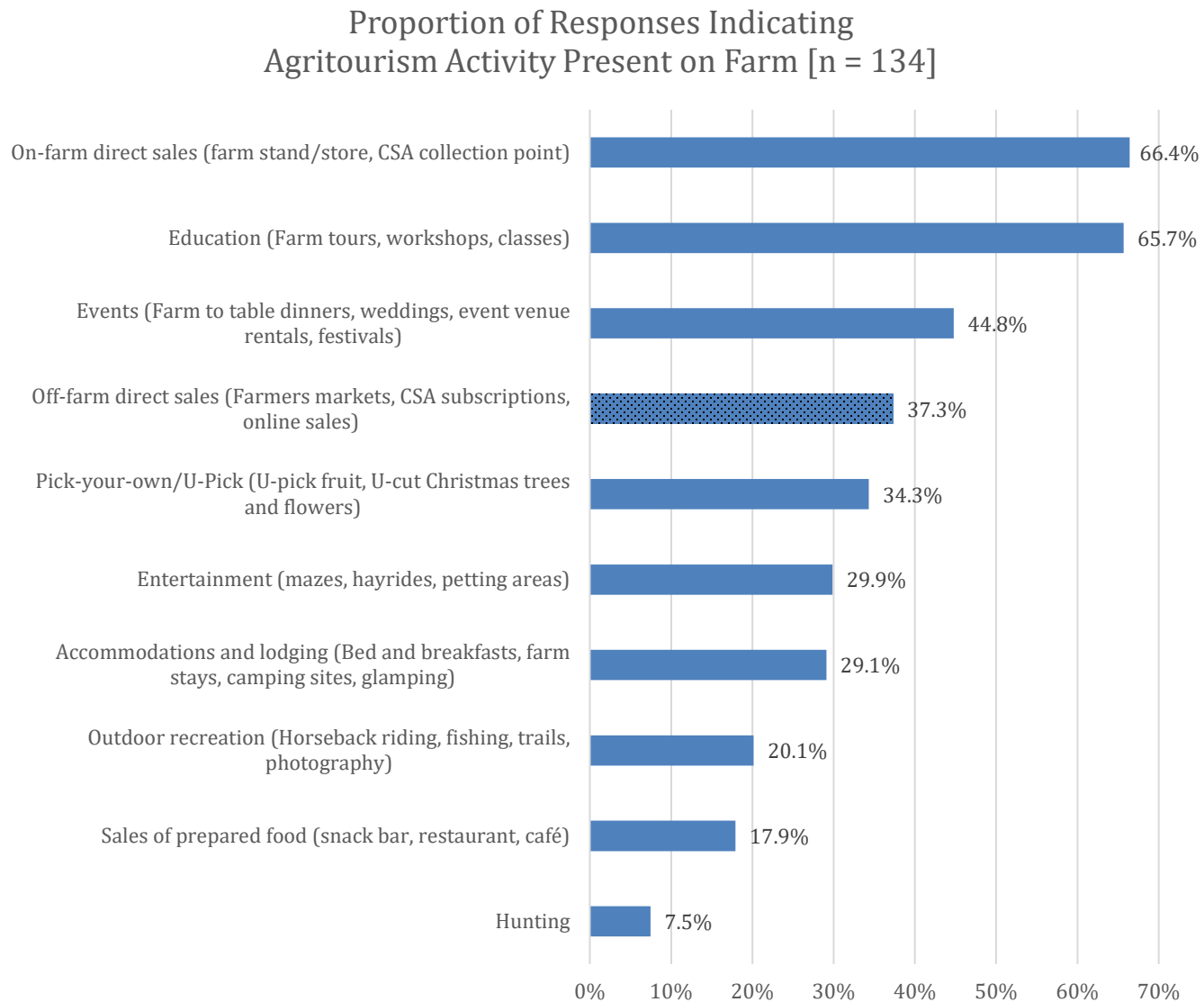


Figure 9 Type of agritourism activity present on farm in 2023

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 activities themselves are profit contributors to the whole-farm bottom line. Farms were asked to provide information about their operations on these.

Figure 10 reports the distribution of respondents across categories of gross sales value obtained in 2023 from agritourism. For 15.7% of respondents, agritourism accounted for less than \$1,000 in sales. Most farms (61.4%) had between \$1,000 and \$99,999 in agritourism sales. Approximately 13.4% of responding firms saw 2023 sales from tourism and recreation activities ranging from \$100,000 to \$1 million, and only 9.4% had more than \$1 million. Compared to national results, the West has a larger proportion of farms in the highest sales categories. While sales information provides an indicator of volume, profitability provides an indicator of the effects on farm incomes.

Figure 11 reports the distribution of respondents across agritourism profit categories. Many enterprises operated at a loss or break-even (32.5%) or contributed less than \$1,000 (9.5%) in net income to the farm. Another 42.9% reported between \$1,000 and \$99,999 in 2023 agritourism profit, and 15% reported higher net earnings, more than \$100,000 from agritourism. More Western respondents report being in the upper net profit categories compared to the national sample.

Proportion of Responses by Gross Value of Sales (from agritourism and recreational services) [n = 127]

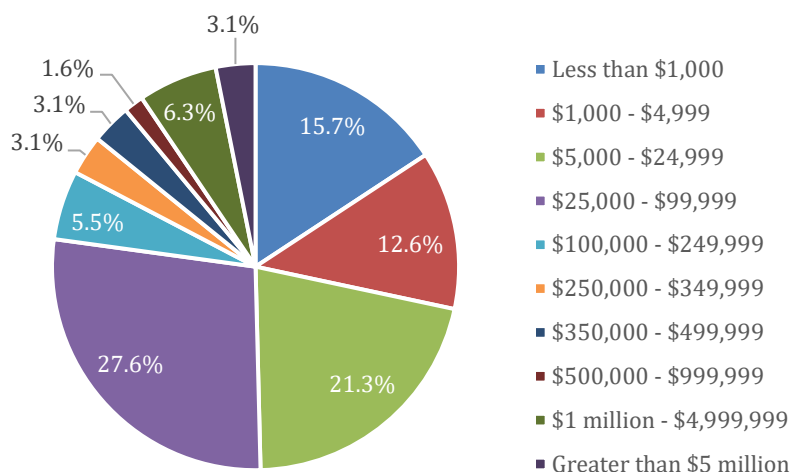


Figure 10 Gross sales value from agritourism or recreational services in 2023

Proportion of Responses by Profit from Agritourism and Recreational Services [n = 126]

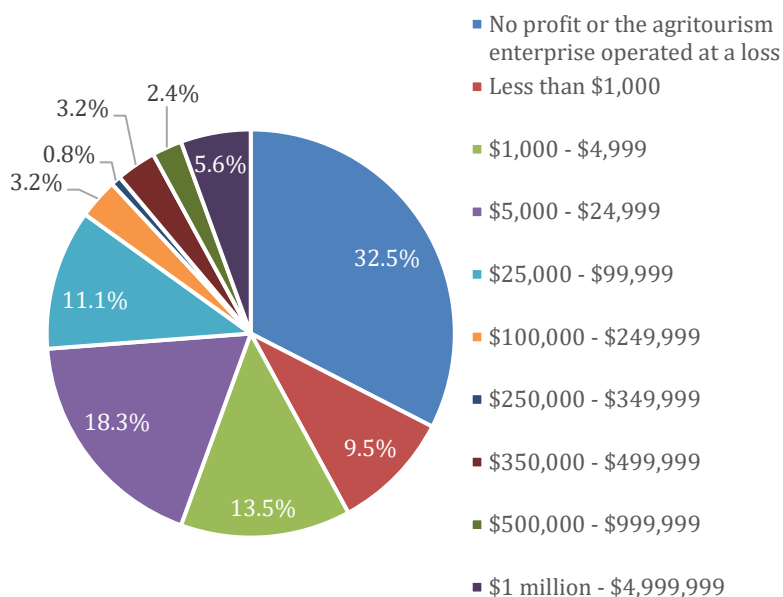


Figure 11 Profit (net income) from agritourism or recreational services in 2023

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

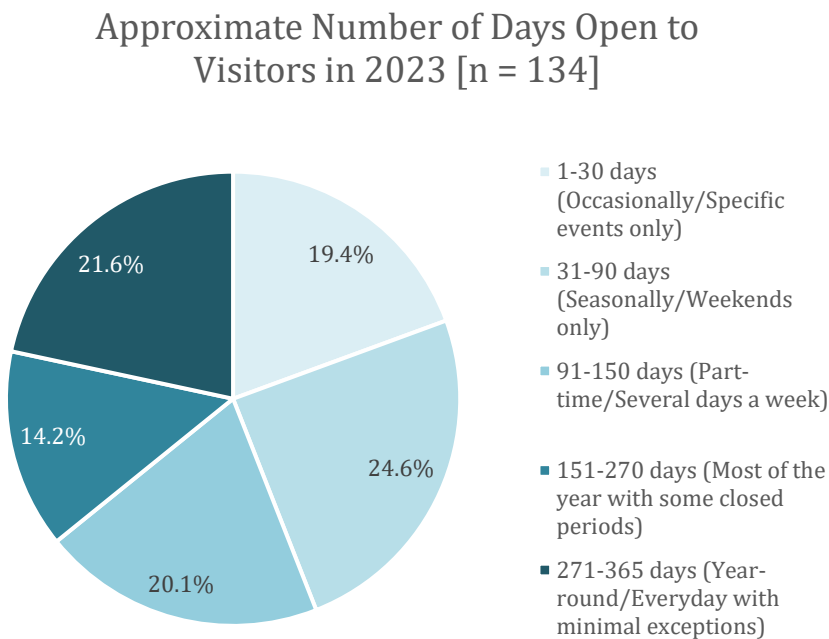


Figure 12 Number of days open to visitors in 2023 (approx.)

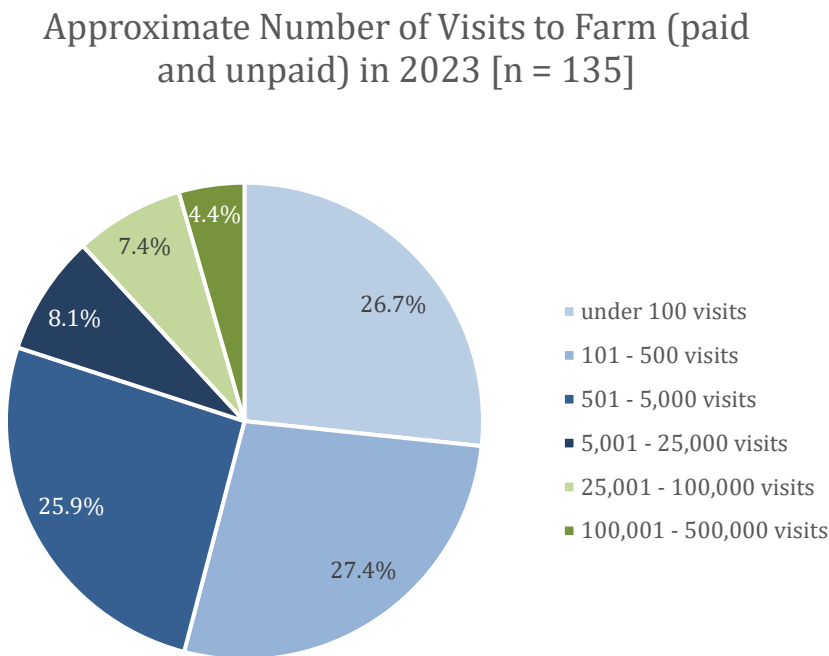


Figure 13 Number of visits to the farm (paid and unpaid) in 2023 (approx.)

Most agritourism farms (64%) 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 to understand the approximate number of days the farm was open for visitors. The West also has a greater proportion of farms welcoming visitors 31 to 150 days versus national data. Results indicate agritourism remains a seasonal activity engaged in only part of the year or for select occasions.

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. Some 80% of Western respondents reported fewer than 5,000 total visits that year. This included 26.7% who had fewer than 100 visits.

Notably, the Western region sub-sample had a lower proportion of farms with fewer than 5 years of experience with agritourism activities (30.77%) and a greater proportion with between 11 and 22 or years' experience (28.5%) compared to national data (Fig. 14), indicating that farms engaged in agritourism may have more experience versus the national average. Some of these farms may need to consider succession planning in the next five years.

Years of Experience with Agritourism Operations [n = 130]

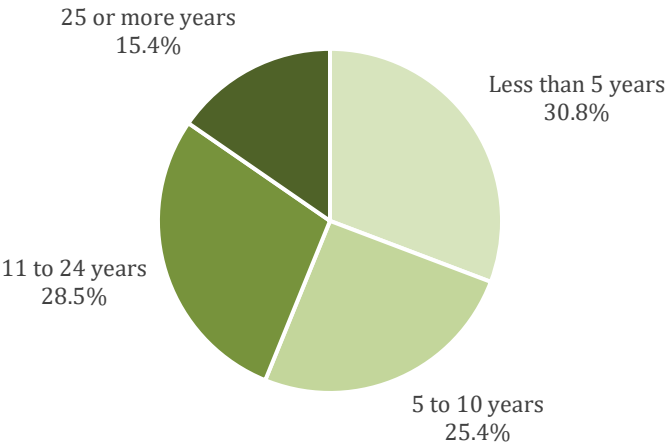


Figure 14 Years of experience with agritourism at this operation

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. Responses were provided voluntarily and survey participants had the opportunity to provide no response, if desired. In total, 131 respondents provided information about the highest level of education they personally have received (Fig. 15). The greatest proportion of respondents (42%) hold a four-year college degree. This is followed by 32% with postgraduate degrees like an MBA or PhD. Smaller segments include those with some college experience and technical degrees from 2-year colleges (12% each). At 2%, the smallest group comprises those who are high school graduates or those with less education.

A similar number (130) also provided information about their primary occupation (Fig. 16). The majority (72%) listed working for their farm or ranch as primary. Off-farm work accounted for 24% of respondents, representing a significant portion engaging in external employment. Smaller proportions, each totaling 2%, identified as retired, homemaking, or not working due to disability or chose not to disclose their primary occupation.

Proportion of Respondents Indicating Highest Level of Educational Attainment [n = 131]

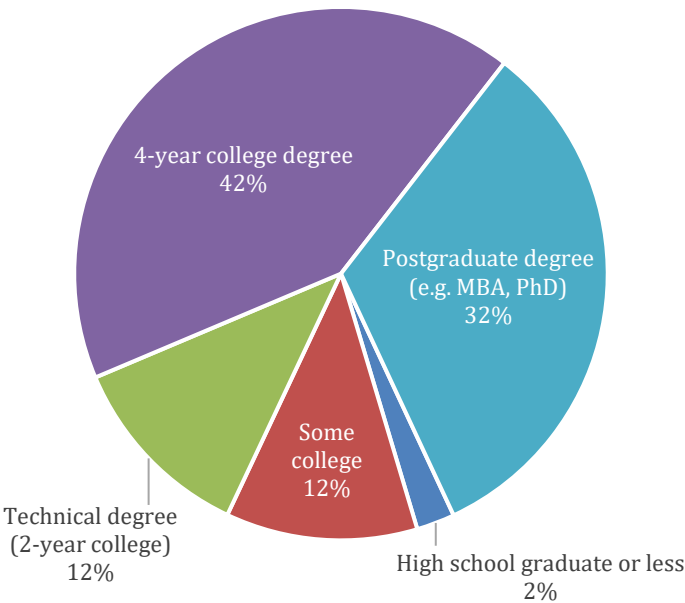


Figure 15 Highest level of educational attainment for respondent

At which occupation did you spend the majority (50% or more) of your worktime in 2023? [n = 130]

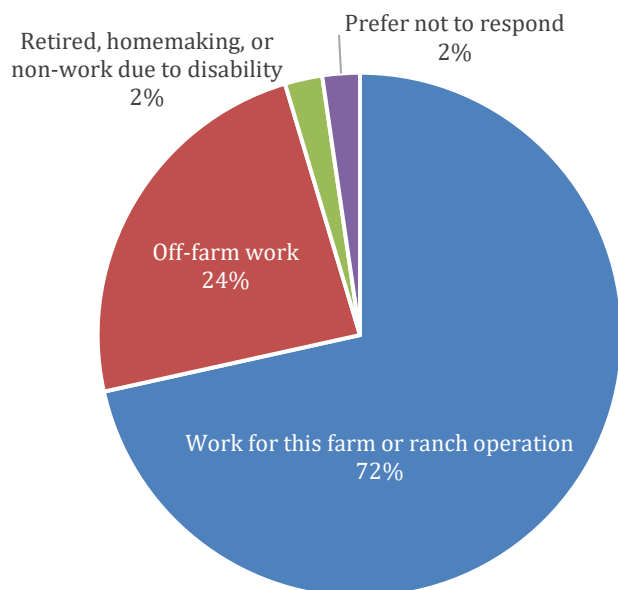


Figure 16 Primary occupation of respondent in 2023

Results also provided information about the background of respondents. The majority (65.4%) were female [n=130]. In terms of veteran status [n=131], 88.5% reported that they had never served in the military. Additionally, 6.9% indicated that they had previously been on active duty, while 1.5% were involved in training for the reserves or the National Guard. Most respondents (63.4%) were 55 years or older, including 39.7% who were over 65 years of age [n=131], further supporting the possible need for succession planning among these operations.

Of the respondents, 100 offered responses about the number of operators – those managing or owning the firm – from various groups; 94% of agritourism operations had at least one woman leading the farm, 19% had at least one military veteran operator, 15% had at least one operator from a non-White non-Hispanic background, 11% had at least one operator who identified as LGBT, and 4% had at least one operator who is a new American.

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 factors of the agritourism entrepreneurial environment. In the West, political capital and governance was the most challenging aspect for responding agritourism operators, with 75.4% indicating it is at least moderately challenging or greater for developing agritourism. This departs from national data and many other state and region sub-samples, where financial capital – such as funding to promote agritourism in a region or directly funding producers with agritourism operations – was most challenging. Among Western respondents, however, financial capital was a close second, with 72.2% rating it as at least moderately challenging or greater. This was followed by built or physical capital (62.2% selecting moderately challenging or greater). Western agritourism operators generally rated social and cultural capital as unchallenging, with more than two-thirds of respondents selecting slightly challenging or posing no challenge at all.

Challenges to Developing Agritourism - The Community Capitals

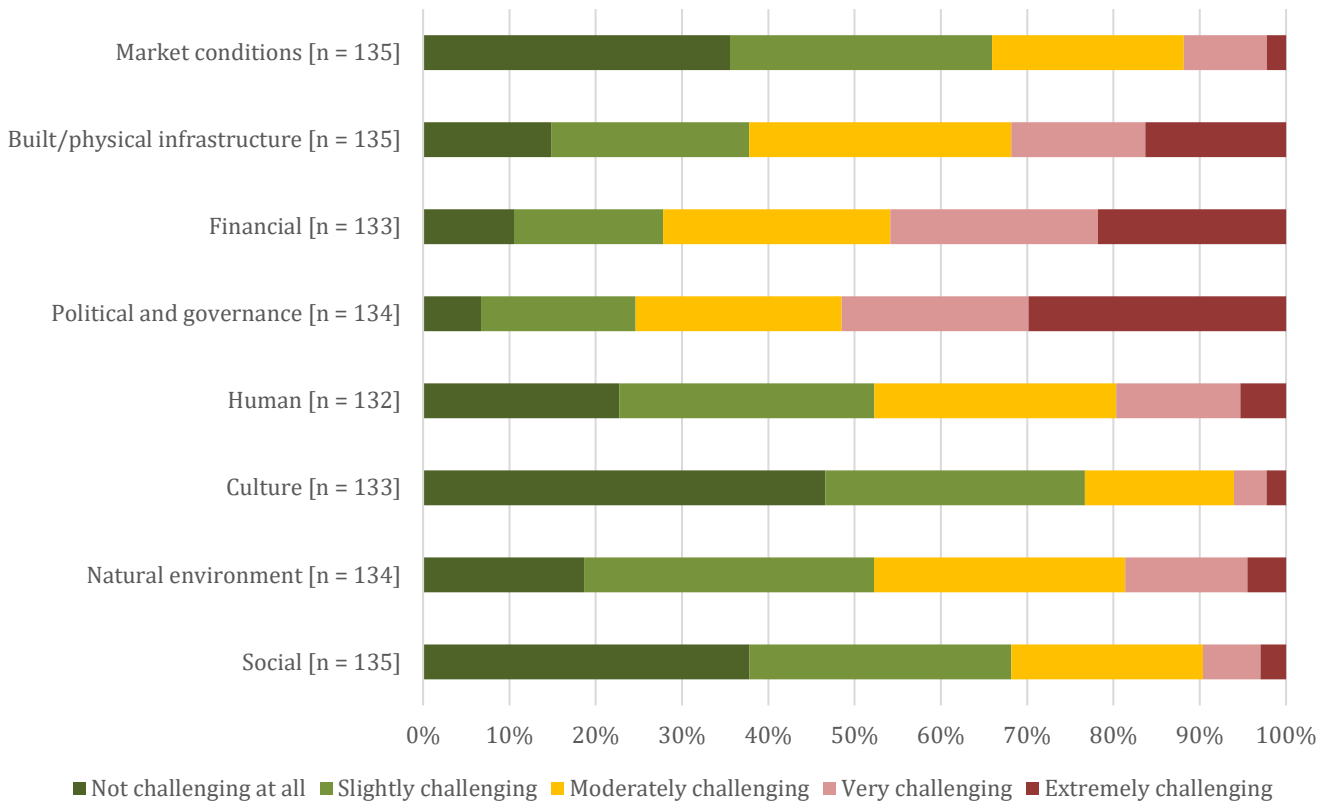


Figure 17 Distribution of respondent ratings of the challenge posed by various entrepreneurial ecosystem features using an augmented Community Capitals Framework

Tourism Destination Amenities

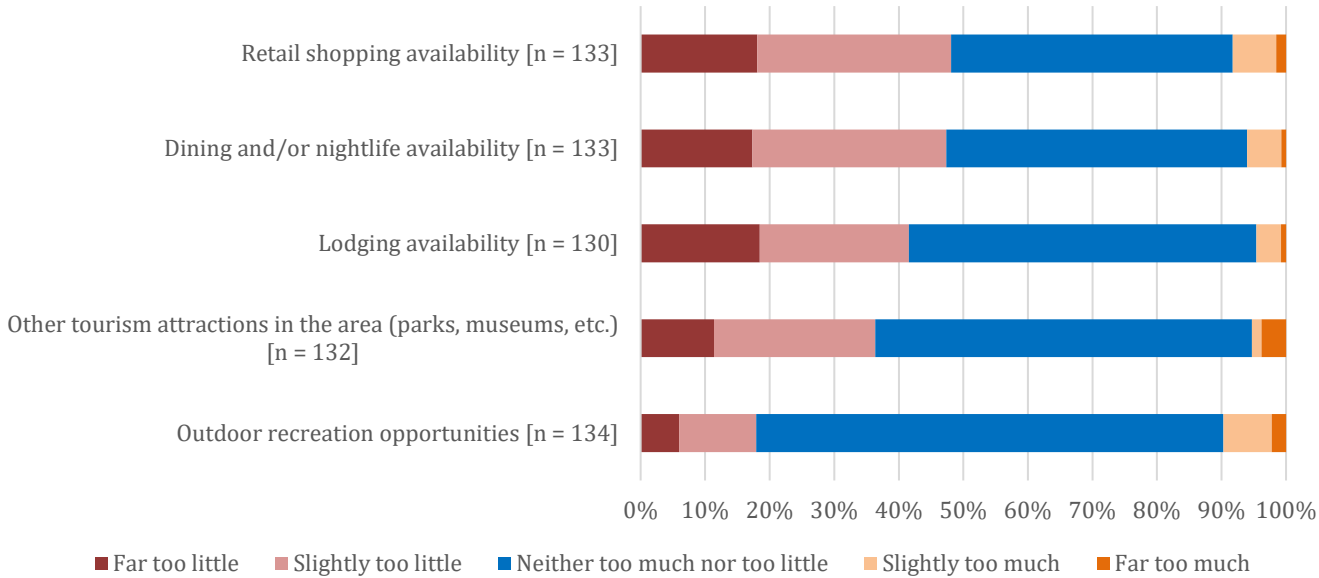


Figure 18 Distribution of respondent ratings of tourism destination amenities in their region

When evaluating a set of five tourism destination amenities within their region (Fig. 18), a majority of respondents were content (i.e. neither too much nor too little) with outdoor recreation opportunities (72.4%), other tourism attractions (56.3%), and lodging availability (53.8%), and most felt content with the other two amenity types. Generally, few (less than 10%) indicated their destinations had “too much” of a given amenity. Retail shopping (48%) and dining/nightlife (47.4%) do show some indications of being under-developed, with the noted proportions being respondents indicating these as slightly or far too little in their destinations. This opens potential strategies for agritourism enterprises to fill these gaps (e.g. establishing an on-farm restaurant, creating barn cocktail hours, etc.). It also highlights the importance of developing economic vibrancy in small towns and villages near farming communities and building connections and alliances between agritourism operators and other businesses within destinations, such as small retailers, to improve destination experiences.

Agritourism Environment Scale Ratings

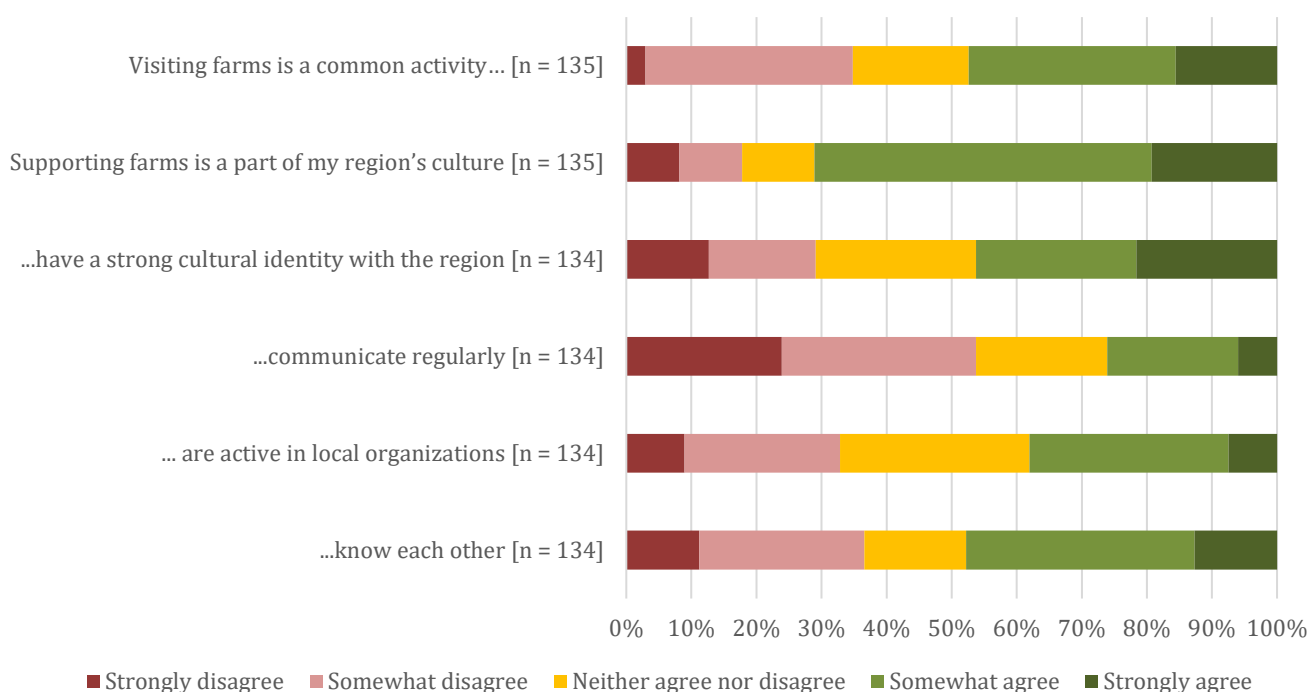


Figure 19 Distribution of respondent ratings of agritourism socio-cultural environment

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. In Western data most respondents agreed with statements positively evaluating the consumer-focused elements of the socio-cultural environment; 71.1% somewhat or strongly agreed that supporting farms is part of their regional culture (8% higher than nationally), and 47.4% agreed that visiting farms is a common activity for regional residents (1% below national data). Indicators of entrepreneurial networks within their region's agritourism industry were also measured. In measures of the strength of social relationships, some 26% of respondents indicated agritourism operators communicate regularly with one another, 38% agreed that agritourism operators are active in local organizations, and 46.3% agreed that agritourism operators near them have a strong regional cultural identity. This, combined with 47.8% agreeing that agritourism operators in their local region know each other, indicates that among the respondents 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, such as zoning. 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. They 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).

Results indicate that for the Western region’s respondents the regulatory landscape may be perceived as more challenging than in other parts of the U.S. as indicated by national-level results from the survey (Schmidt et al., 2025); a majority of respondents indicated “moderately challenging” or greater on four of the eight pre-populated regulatory issues (Fig. 20). Civil liability was the most challenging regulatory item for Western agritourism operations with 64.4% rating it as a moderate or greater challenge. This was followed by building code requirements (57.8%), designating agritourism as a retail site (57.5%) which often imposes certain infrastructure and facilities requirements on businesses, and land zoning (51%) rated as moderately challenging or greater.

This represents significant departures from national-level results from the survey, where only one item (civil liability) had a majority of ratings as moderately challenging or greater. Notably, larger proportions of Western respondents were also rating regulatory items as very or extremely challenging compared to national-level results, further indicating that the region’s agritourism operators perceive the region’s regulatory landscape as a severe challenge. Qualitative responses from the region (not reported here) also highlight this challenge.

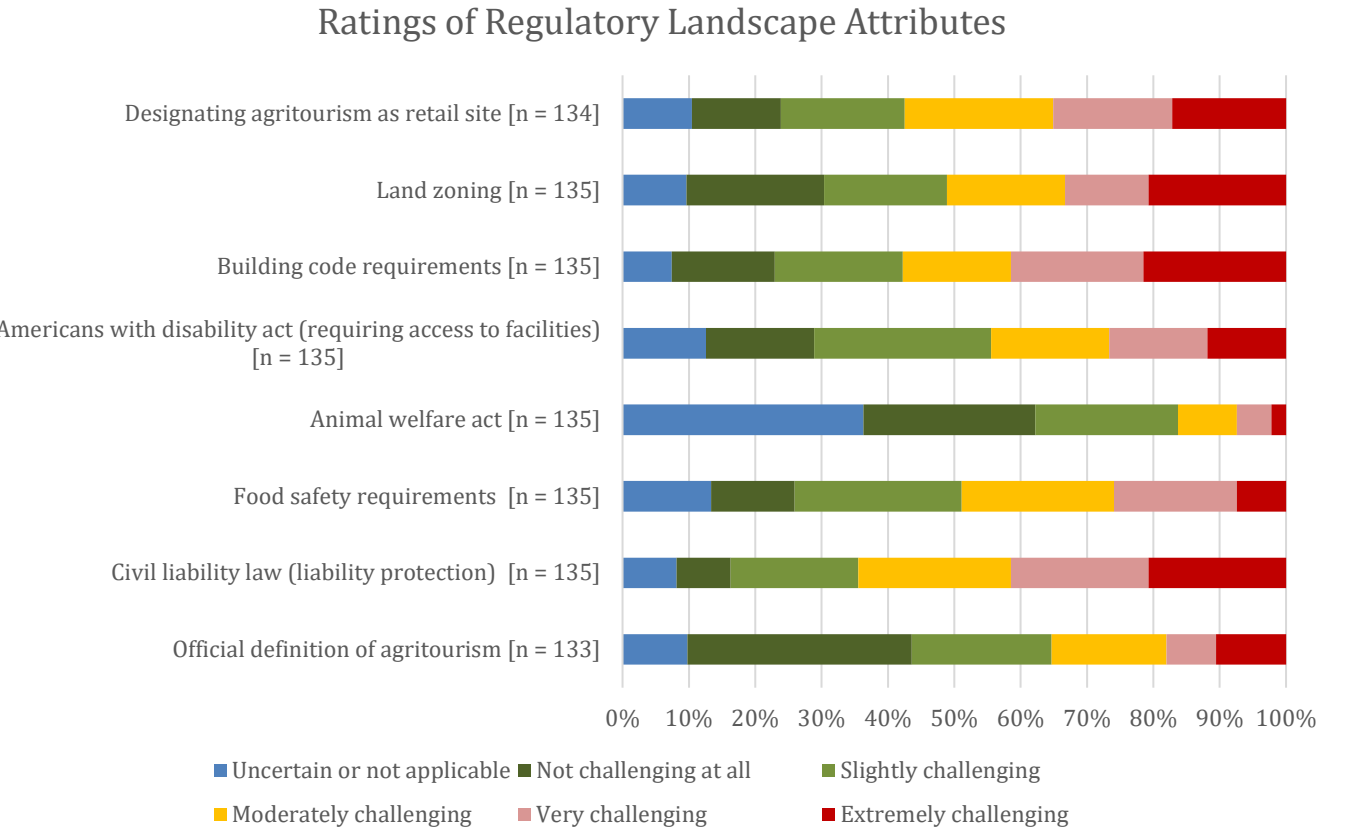


Figure 20 Distribution of respondent ratings of regulatory landscape attributes

What are agritourism operators' experiences and practices concerning regulations?

Does your state have an agritourism liability act? [n = 135]

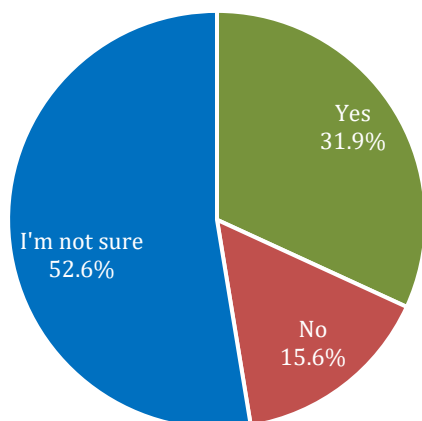


Figure 21 Does your state have an agritourism liability act?

How confident are you that you have complied with all the requirements of the agritourism liability act? [n = 43]

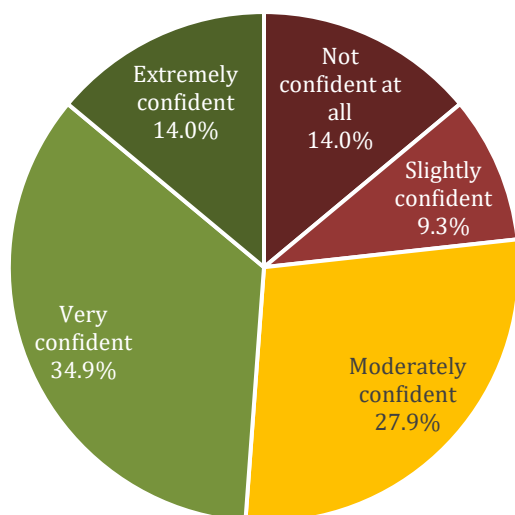


Figure 22 Confidence that farm has complied with requirements of local agritourism liability laws

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 with disputes (Figs. 27 to 29).

Most (52.6%) 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 visitors into a public space poses a risk of liability, but legal mechanisms are available to reduce those risks. Some states – including Washington, Oregon, Idaho, Montana, Utah, Colorado, and [partially] Alaska – have adopted laws limiting liability claims by participants in agritourism activities. In their most recent legislative sessions, California (AB 2635), Nevada (SB 55), and New Mexico (HB 521) had proposed legislation on agritourism civil liability which failed to be enacted into law. To learn more about current statutes in these and other states, visit [the National Agricultural Law Center’s agritourism hub](#).

Respondents who believe their state has an agritourism liability act (n = 43), were then asked to rate their confidence that they are following it (Fig. 22). Of these, 49% are very or extremely confident they comply with the requirements. Some 27.9% are moderately confident of their compliance, and 23.3% are slightly or not at all confident of compliance.

Proportion of Respondents Indicating a Liability Practice Utilized
[n = 132]

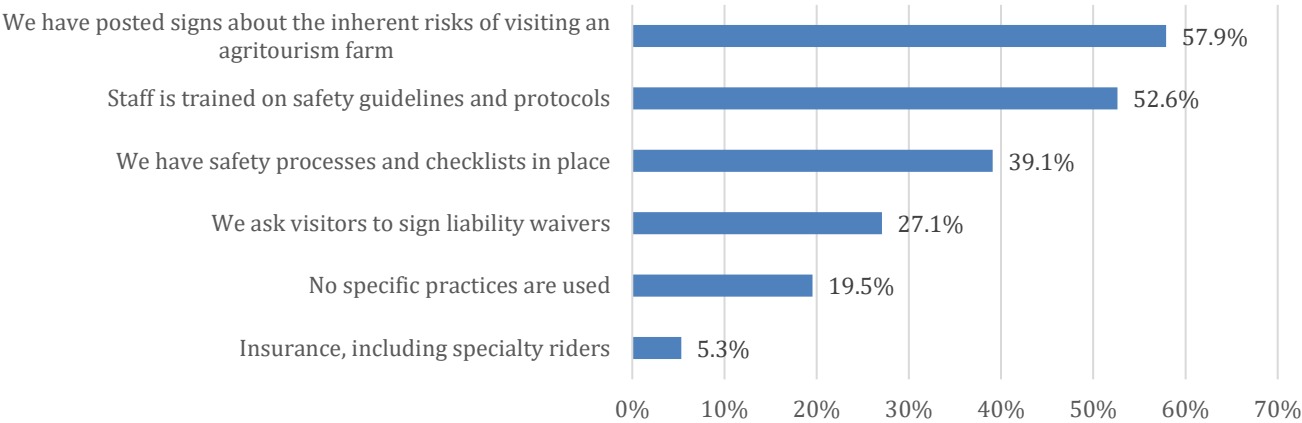
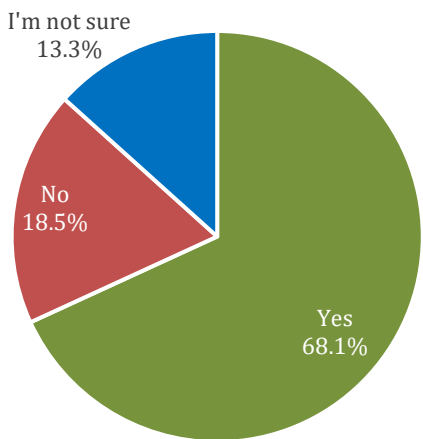


Figure 23 Liability practices utilized

Apart from direct legal protection from civil liability, farms can adopt practices to reduce or mitigate risks and liability. Figure 23 presents data on the proportion of Western operators who indicated that they engage in selected practices. 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. Just 19.5% responded they do not use any specific practices. The most common practice used is the posting of warning signs (57.9%). A majority (52.6%) also indicated they train staff on safety guidelines and protocols and more than a third (39.1%) reported their farms have implemented safety processes and checklists. Visitors being asked to sign liability waivers was the least common practice among those offered in the questionnaire, with 27.1% of sub-sample valid responses selecting this option; this is a substantially larger proportion than among the national sample (18.4%). Western

respondents also wrote-in a number of free-responses, including 5.3% who indicated insurance and specialty riders. Other write-in practices identified include 1.5% each utilizing: a warning on their website or digital presence; tickets or wrist-bands; and including liability waivers in event and space lease contracts; while 0.8% each indicated they directly supervise or escort guests and that they restrict access to certain spaces.

Proportion of Respondents
Indicating Whether Farm Has
Liability Insurance Covering
Agritourism [n = 135]



In a separate question, respondents were directly asked about carrying an insurance policy with liability coverage for the agritourism operation (Fig. 24). Of the 135 valid responses, 68.1% indicated they have liability insurance that specifically covers agritourism. A smaller proportion (18.5%) said they do not have such insurance coverage, and 13.3% were uncertain.

Figure 24 Farm has liability insurance covering agritourism?

Proportion of Respondents Indicating Degree of Difficulty in Complying with Zoning [n = 134]

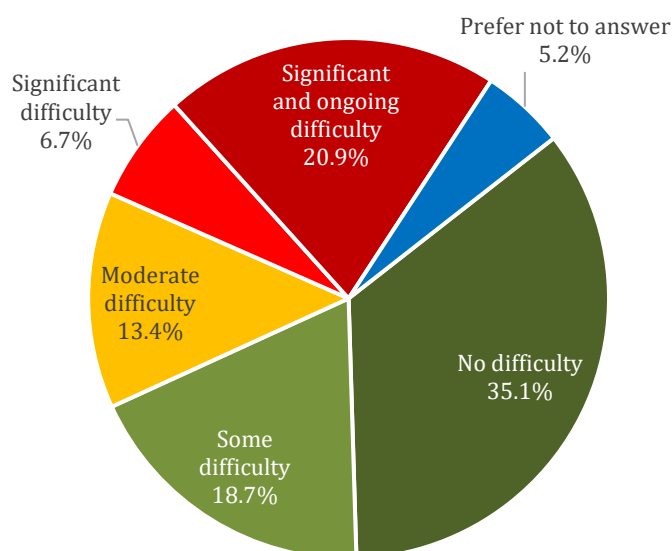


Figure 25 Degree of difficulty in complying with zoning

Compliance with zoning regulations may also be challenging for agritourism operations in some jurisdictions, 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. Survey participants were asked to rate their experience with zoning compliance (Fig. 25). Here, Western region results exhibit a stark departure from those nationally. Of the 134 valid responses, 35.1% indicated they have had no difficulty (nationally: 57.7%). Conversely, 27.6% indicated significant difficulty, including 20.9% which indicated this was ongoing. Compare this to just 11.9% nationally who reported significant difficulty (ongoing or prior). Some 5.2% preferred not to provide an answer.

How confident are you that you are in compliance with agritourism regulations? [n = 135]

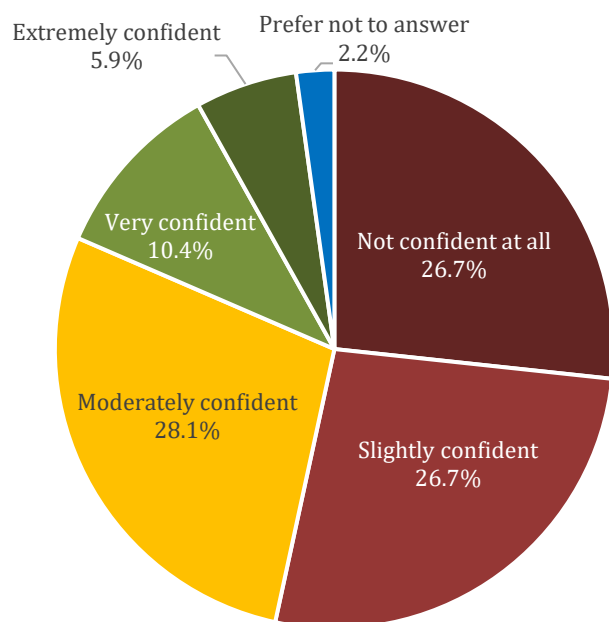
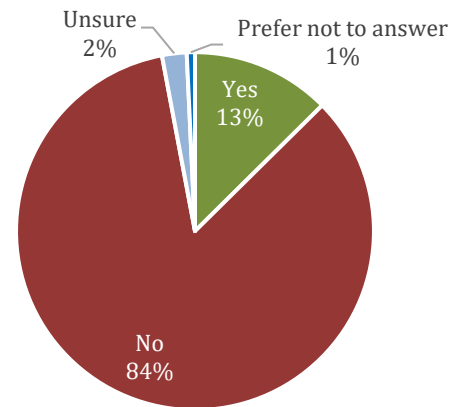


Figure 26 How confident are you that you are in compliance with agritourism regulations?

Given the variation in regulatory issues across jurisdictions, the survey also posed a catch-all question to understand agritourism operators' confidence in their general compliance with agritourism regulations applicable to their business. Figure 26 reports the distribution of ratings among the 135 valid observations. Results indicate a majority of Western producers lack confidence that they know about and have complied with applicable regulations; 53.4% were not at all or only slightly confident. Additionally, 28.1% indicated they were moderately confident. The implication is that more work can be done with agritourism operators to improve their knowledge of regulatory issues and connect them with resources to invest in building compliance strategies; in the West, particularly, support providers may assist farms in filling their knowledge gaps on regulatory matters and seek to address compliance-relevant resource barriers.

Disputes with various parties – regulators, zoning boards, neighbors, employees, customers, etc. – may arise amid any business activity. 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 valid responses, 84% indicated they had not experienced such significant disputes. Approximately 3% were either unsure or preferred not to answer, while 13% indicated yes, their agritourism operation has experienced at least one significant dispute.

Proportion of Respondents Indicating Whether Farm Has Experienced Significant Disputes [n = 135]



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 (68%) reported they had not experienced any disputes. Figure 25 reports the dispute types most encountered. Conflicts with neighbors were reported with the greatest frequency among the respondents, including those over issues such as noise, smells, or traffic (13.9%), property lines (5.7%), and of unspecified type (1.7%). Disputes with participants (i.e., customers or visitors) were the next most common (12.3%), almost double the national rate (6.6%). A number of Western respondents provided open-ended write-in answers, including disputes with governmental entities (5.8%), with employees (3.3%), and with vendors (2.5%).

Figure 27 Experienced significant disputes related to their agritourism enterprise?

Most Common Types of Disputes Encountered [n = 122]

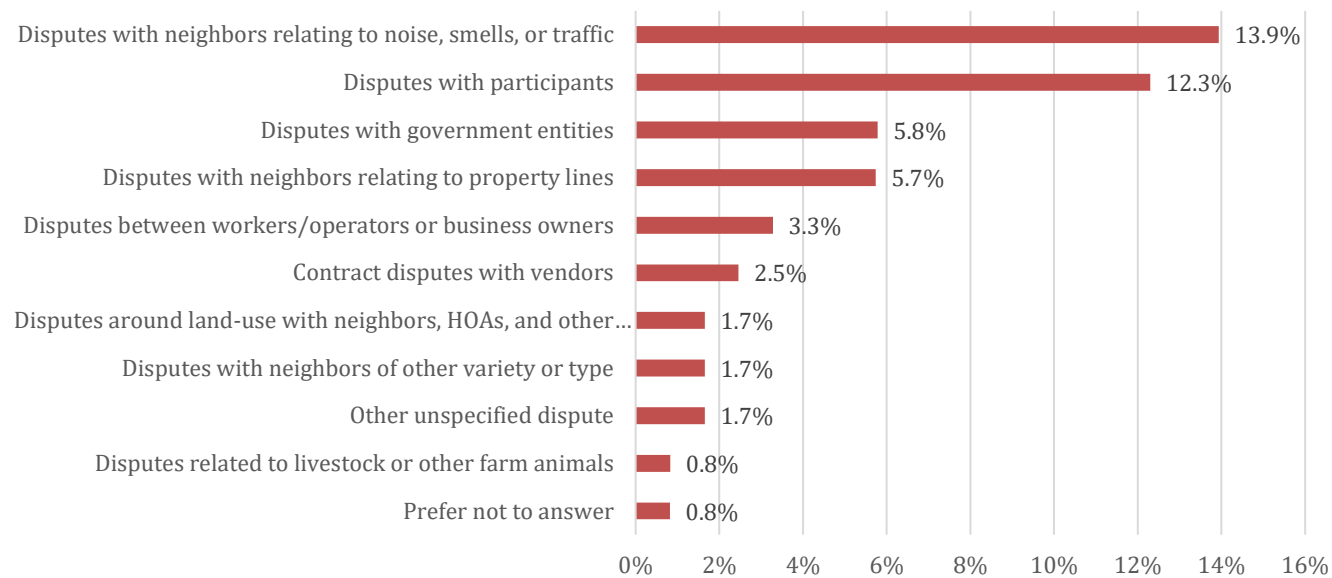


Figure 28 Type of dispute(s) experienced

The 17 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 an Agricultural Mediation Program (AMP). Mediation is a voluntary process that can help resolve disputes related to farm 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 services¹. The contact information for the 11 Western states with AMP programs can be found on the Coalition of Agriculture Mediation Program [website](#); these programs are managed by their respective state departments of agriculture (Colorado, Montana, Utah, and Wyoming), Land-Grant Cooperative Extension services (New Mexico), and private organizations (Alaska, California, Hawai'i, Idaho, Oregon, and Washington).

We asked eligible respondents about their knowledge and use of mediation services following a dispute (Fig. 29). Of these most were unaware of mediation services. None participated in such services. Not all disputes are conducive to mediation. The structure of the survey limited the pool of respondents who were presented this question. However, among those who did engage, and based on results from the wider national sample, data indicate that better integration of the Agriculture Mediation Program 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.

Proportion of Responses to the Quesiton "Have you contacted your state Agricultural Mediation Program to request assistance in resolving a dispute?" [n = 17]

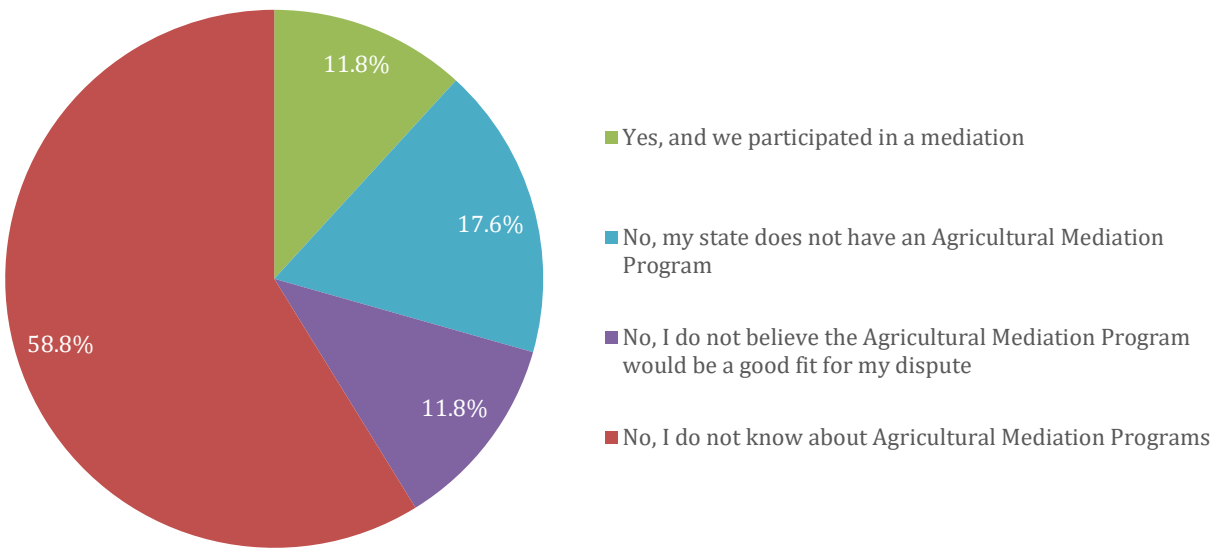


Figure 29 Have you contacted your state Agricultural Mediation Program to request assistance in resolving a dispute?

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

What support organizations and programming interest agritourism operators?

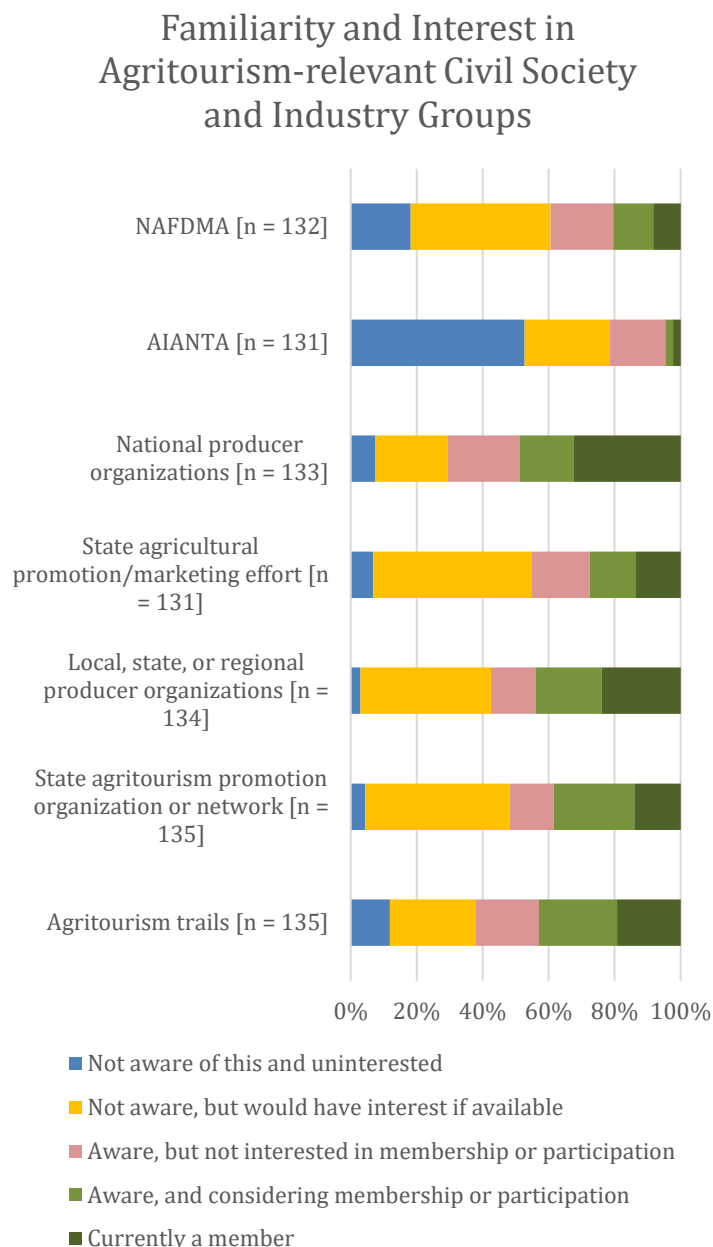


Figure 30 Distribution of respondent ratings of familiarity and interest in agritourism-relevant civil society and industry groups

activities such as an agriculture promotion or marketing effort (48.1%) or agritourism promotion organization or network (43.7%). Sizeable proportions also indicated awareness and active consideration of membership in state-level efforts. National agritourism-focused organizations NAFDMA (42.4%) and Aianta (26%) also had sizeable proportions of respondents who lacked awareness but may have interest in these networks. Assistance – such as technical support, financing, etc. – that helps producers connect with or create these organizations may have promise for building collective strategies.

Various organizations and agencies exist within the agritourism support ecosystem that provide aid in developing agritourism enterprises and destinations. These organizations may provide 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 NAFDMA (an international agritourism membership organization) 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 135 region respondents provided at least one rating for the organizations included in the question.

Agritourism operations in the West are most frequently (32.3%) current members of national producer organizations – such as the Farm Bureau Federation, National Farmers Union, or Grange. Smaller proportions have current membership in local/regional (23.9%) producer organizations. Further, notable proportions indicated they are not aware of but would have interest in participating in state-wide

Figure 30 also provides data on operators’ perspectives on a tool for agritourism-focused destination management and promotion that is growing in popularity – the local agritourism “trail”. Most known among the winemaking and vineyard industry (“wine trails”), both sector-specific and diversified sector trails have emerged across the U.S. and abroad. Among the sub-sample, 19.3% of respondents indicated they are current members of a trail – higher than the 11.5% nationally. Further, nearly half of respondents (49.6%) indicated interest in agritourism trail membership, including 23.7% that are aware of a regional trail and actively considering membership.

What types of support can organizations – such as the Cooperative Extension services at Western Land-Grants or Tribal Colleges – provide that many agritourism operators would find helpful? Results of the survey provide insight into this question, shown in Figure 31. Here, the West departs from national data in that among Western respondents, policy advocacy has the highest proportion indicating this type of support would be helpful (West: 72.2%; national: 61.7%). This is followed by financial (71.4%) and then marketing assistance (64.3%). Legal issues (West: 61.9%, national: 60.3%) and networking and event coordination (West: 54%; national 55.9%) had approximately the same proportion indicating helpfulness in the region versus nationally, while fewer in the West felt this about technical assistance (West: 55.6%; national: 62.1%).

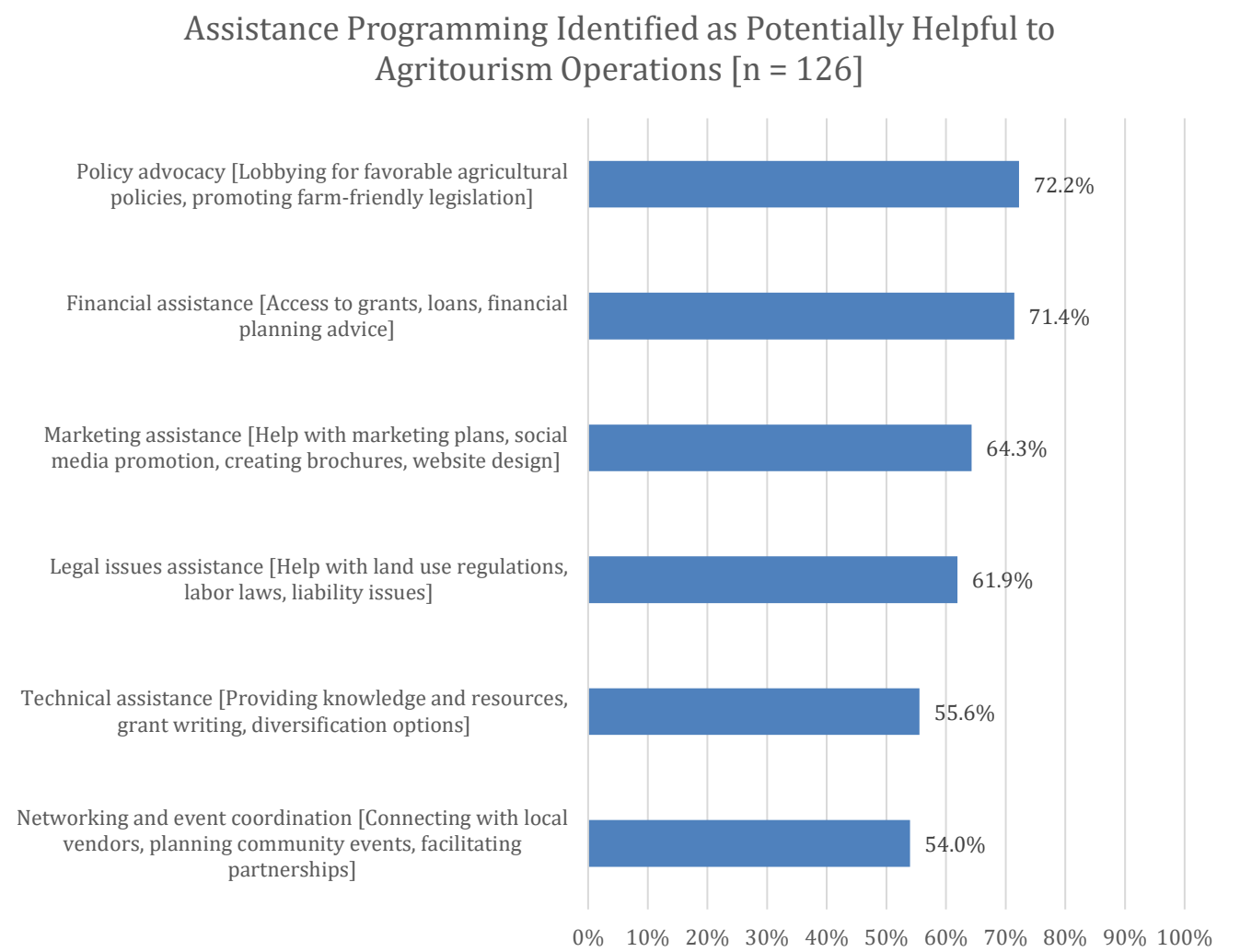


Figure 31 Type(s) of assistance that would be helpful in developing agritourism enterprise

Respondents were also asked specifically what types of financial programs they utilized during 2023 to support the development of their agritourism enterprises. Figure 32 depicts the proportion of the 130 responses selecting different options. Overwhelmingly (70%), operators indicated they did not receive any grants or loans in 2023, and 27.7% also indicated they were not aware of any grants or loans being available to support their agritourism business. Those indicating they did engage in financial support programs were much less frequent, with 12.3% indicating they received grants, 5.4% obtaining loans, 5.4% receiving donations via fundraising, and 3.8% having in-kind technical assistance or marketing dollars. As alterations in Federal farm programs and policy are anticipated, mobilizing state resources to improve access to and use of financial capital services may be beneficial.

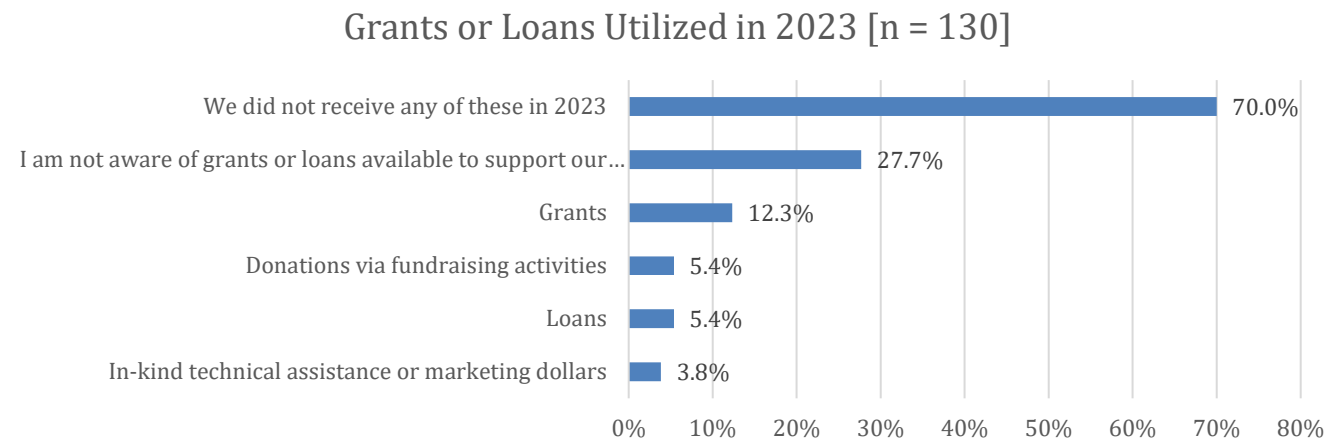


Figure 32 Type of financial supports utilized in 2023

How do operators view the future of agritourism?

Despite challenges and barriers, Western 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), 78.6% of operators felt their operation’s number of visitors would increase moderately or significantly, 74% felt that way about their operation’s profitability, and 72.3% felt they would expand the number of agritourism activities or initiatives on their farm moderately or significantly. These proportions are slightly higher than the national whole-sample results. The proportion of Western respondents who felt that all three measures would stay the same were also slightly higher than national-level results. However, approximately 7% of Western respondents feared the profitability of their agritourism operations would moderately or significantly decrease in the next five years – slightly more than the proportion among the whole national sample.

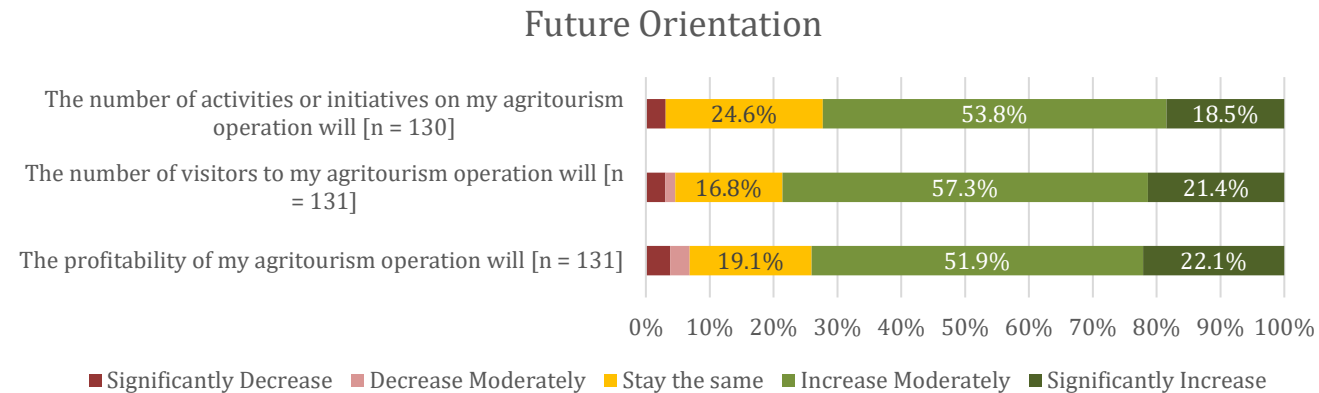


Figure 33 Distribution of respondent ratings of the future orientation of their agritourism enterprises

Conclusion and recommendations

Agritourism presents a promising yet underutilized opportunity for farmers to diversify income streams and strengthen rural economies. In the Western region, where outdoor recreation economies have historically existed and where they receive relative support compared to other regions, this may present opportunities for farms and ranches – including those in remote communities of the region – to develop agritourism activities which leverage these amenities and infrastructure. Western agritourism operators appear particularly challenged by policy and regulatory issues, including disputes relevant to these items and the need for targeted advocacy and support. Building networks and forming organizations that can engage in advocacy and policy capacity building may benefit Western agritourism operations.

The results of the *2024 National Agritourism Producer Survey* reveal that while many farms and ranches actively engage in agritourism, there are some common barriers which hinder its full potential from being realized. Key challenges seen in the West and similar to those elsewhere include issues with limited access to financial resources, inadequate infrastructure, and gaps in social capital among agritourism operators – notably a need to connect with agritourism trails and state-level organizations and campaigns. The survey highlights that a substantial proportion of agritourism operators struggle with profitability in their service-based enterprises.

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:

- **Focus on Policy Education and Advocacy Capacity Building:** Offer programming which supports agritourism operators in understanding how to create and manage successful industry organizations, which can represent farm and ranch interests on agritourism and provide policy education. Engage stakeholders in state and local governments so that they have access to evidence-based decision-making tools that help them understand policy challenges and opportunities relevant to agritourism business development.
- **Enhance Regulatory Guidance:** Offer educational workshops, legal consultations, and where available, connect agritourism farms with mediation programs so operators can better understand and manage legal and policy risks. Improve capacity among local policy and enforcement officials and agritourism support providers to provide agritourism-relevant advice and assistance.
- **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. Improve outreach and connections between agritourism operations, destination management organizations, and state- and local- promotion efforts.
- **Strengthen Social Capital:** Facilitate the development of farm and ranch networks to improve communication, encourage collaboration, and promote regional branding efforts. Extension programs can facilitate these connections by hosting dedicated agritourism programs.

Next Steps for Research

Research in the region should explore public policy issues and effects at local and state levels, with a drive toward understanding and identifying best practices. Monitoring local and regional agritourism's long-term economic and community impacts would also support policy focus and evidence-based decision making. Detailed investigation of novel challenges and barriers within Western contexts and rural business environments can improve understanding of profitability and expansion barriers.

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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