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

By R. David Lamie and Will Culler (Clemson University),
Claudia Schmidt (Penn State and NERCRD),
Jason Entsminger (University of Maine),
and Sarah Cornelisse and Jackie Schweichler (Penn State)

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R. David Lamie, Ph.D.
Professor of Agricultural and Rural Development
Clemson University

Will C. Culler, Ph.D.
Senior Extension Agent
Clemson University

Claudia Schmidt, Ph.D.
Assistant Professor of Marketing and Local/Regional Food Systems and State Extension Specialist
Penn State University

Jason S. Entsminger, Ph.D.
Assistant Professor of Entrepreneurship and Innovation
State Extension Specialist for Small Business
University of Maine

Sarah Cornelisse, M.S.
Senior Extension Program Specialist
Penn State University

Jackie Schweichler, JD
Staff Attorney
Penn State University

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Introduction

According to the latest Agricultural Census (2022), South Carolina has 516 agritourism operators spread across its counties. Orangeburg County leads with 32 operators, closely followed by Anderson County's 31 and York County's 28. Several other counties, including Laurens, Aiken, and Oconee, also have over 20 operators each (see Figure 1). According to South Carolina law, agritourism activities are defined as those activities carried out on a farm or ranch that allow members of the general public, for recreational, entertainment, or educational purposes, to participate in rural activities (South Carolina Legislature, 2010).

Beginning in 2009, Clemson University, in collaboration with North Carolina State University and the University of Georgia, was involved in providing training for agritourism service providers and agritourism enterprises as a program from the Clemson Institute for Economic and Community Development. By 2013, the PeeDee region of the state had developed a multi-county agritourism alliance that met regularly to provide sector development support and to support projects, including a website that featured profiles and a map of agritourism businesses and an Agritourism Passport project. Soon after the South Carolina Department of Agriculture hired a full-time agritourism development professional, the South Carolina Agritourism Association was established. This statewide organization has been instrumental in promoting agritourism across South Carolina. Their initiatives have included the development of a statewide Agritourism Passport program, creating business profiles and mapping resources, and organizing an annual statewide conference. These efforts have significantly contributed to the growth and promotion of agritourism experiences throughout the state. The organization continues to play a pivotal role in supporting and advancing agritourism in South Carolina to the present day (see: https://scagritourism.org/). Also beginning in 2009, a regional Clemson Extension project focused on identifying and promoting rural tourism assets in the Catawba region of South Carolina through a collection of eclectic "trails" featuring artists, unique cultural and natural features, and specialty foods, By 2012, this evolved to become the South Carolina Ag and Art Tour. This program is organized county-by-county and features a "free" tour of agritourism oriented farms and related businesses with a wide variety of artisans and performance artists featuring their talents on the farms (see: https://www.agandarttour.com/).

Due to the inherent risks associated with allowing the general public to easily access farm-based activities, and seeking to provide agritourism operators with protections from civil liability resulting from accidental injury or death of visitors, the South Carolina legislature enacted legislation that requires agritourism operators to provide public notice of these inherent risks in exchange for alleviation of civil liability. Proper notice of risks involves the display of signage with language prescribed by the law and inclusion of the same language in contracts and agreements related to the agritourism operation. This legislation was first put into place in 2010 (South Carolina Legislature, 2010).

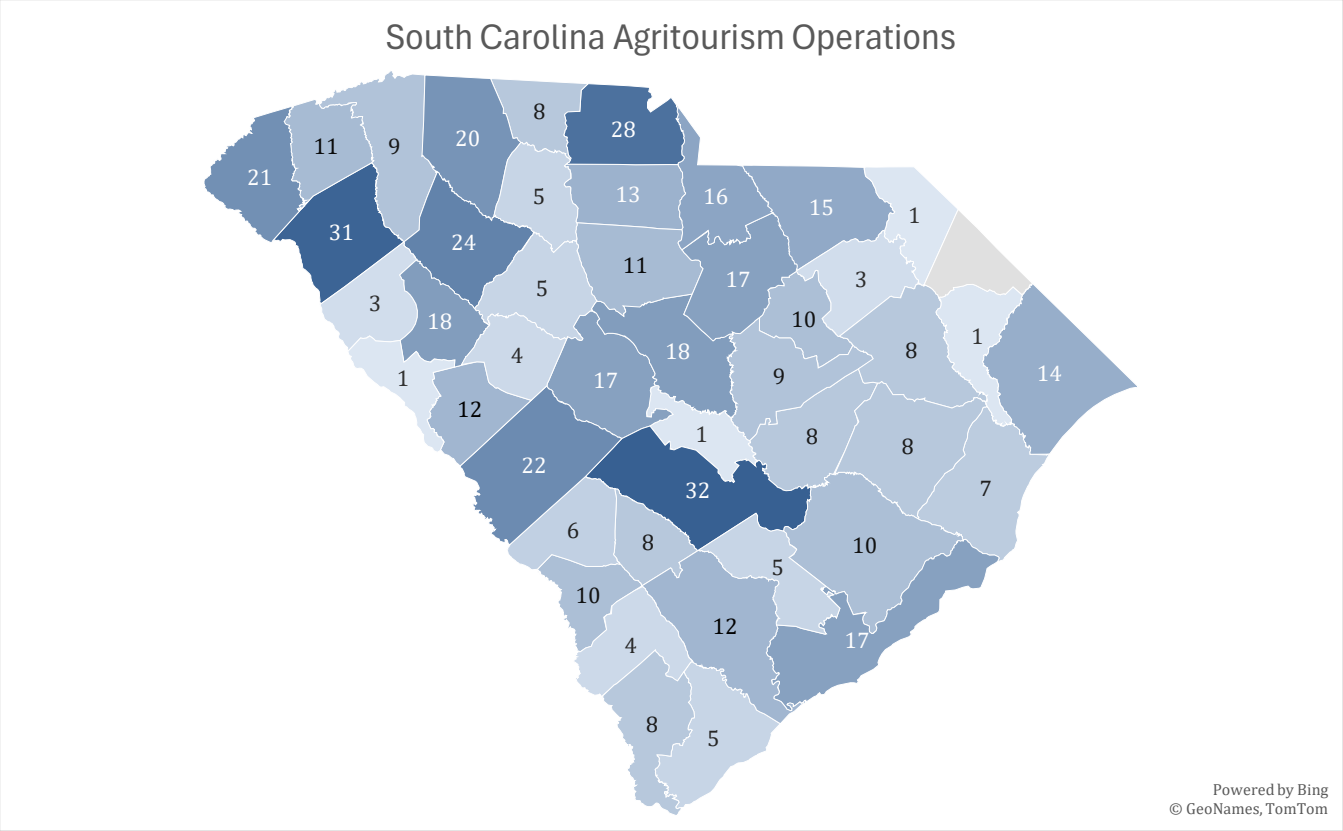

Figure 1 Number of Agritourism Operators in South Carolina (NASS, 2024)

This report presents findings from the 2024 National Agritourism Producer Survey, with a specific focus on South Carolina producers. The survey questionnaire was developed by researchers from Penn State, the University of Maine, the University of Vermont, and Oklahoma State University. Researchers from Clemson University facilitated distribution across the state of South Carolina. 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. A total of 63 survey responses came from South Carolina farms. This represents 2.9% of all responses.

The majority of South Carolina farms with agritourism enterprises were classified as small- to medium-scale operations. In 2023, 79.4% of South Carolina operations surveyed for agritourism produced animals and animal-related products. Additionally, 63.5% of the farms grew fruits and vegetables, while 36.5% produced value-added products.

Direct-to-consumer sales and educational activities such as tours or workshops were the most common agritourism activities at 76.2% for each. Events (54%), entertainment (46%), and pick-your-own sales

(41.3%) were also common. The least common activities among South Carolina farms were hunting (6.3%), sales of prepared food (20.6%), and accommodations and lodging (25.4%). 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, while also considering whether these efforts might overlook segments of the state's agritourism economy that offer diverse experiences beyond the predominant activities reported.

Where are responding agritourism operations located?

Producers responding to the survey were located in both metropolitan and rural (non-metro) counties (see Figure 2). Using the USDA's Rural-Urban Continuum Codes and information about farm location, we can classify the counties where respondent farms are located. While a majority (73%) of South Carolina agritourism operations are located in metropolitan counties with populations of 250,000 residents or greater, this concentration risks overlooking the importance of rural regions that contribute significantly to the state's agritourism economy. In fact, none of the respondents for this sub-sample are located in "remote" non-metro counties – the most rural type in the RUCC classification scheme. This indicates that many South Carolina operations with agritourism enterprises are located in peri-urban spaces near population centers; however, given the state's small geographic size, the absence of responses from non-metropolitan counties is concerning and may suggest an underrepresentation of rural agritourism activity in the data.

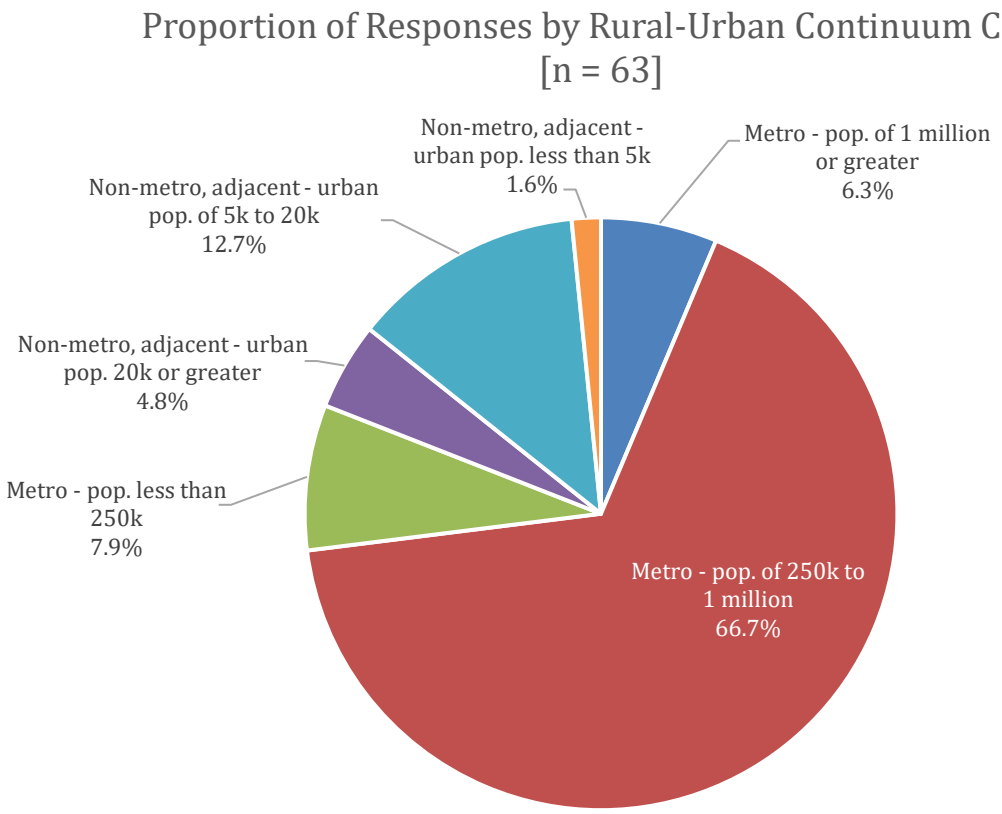

Figure 2. Community type by the Rural-Urban Continuum Code (RUCC) classification of counties

How large are responding agritourism operations?

Overwhelmingly, South Carolina farms with agritourism enterprises 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 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 categories. The 2024 National Agritourism Producer Survey did not collect all of the same 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 with managerial or decision-making responsibilities for the farm; however, the responses may not reflect actual conditions in South Carolina, where several prominent agritourism destinations operate on relatively large acreages.

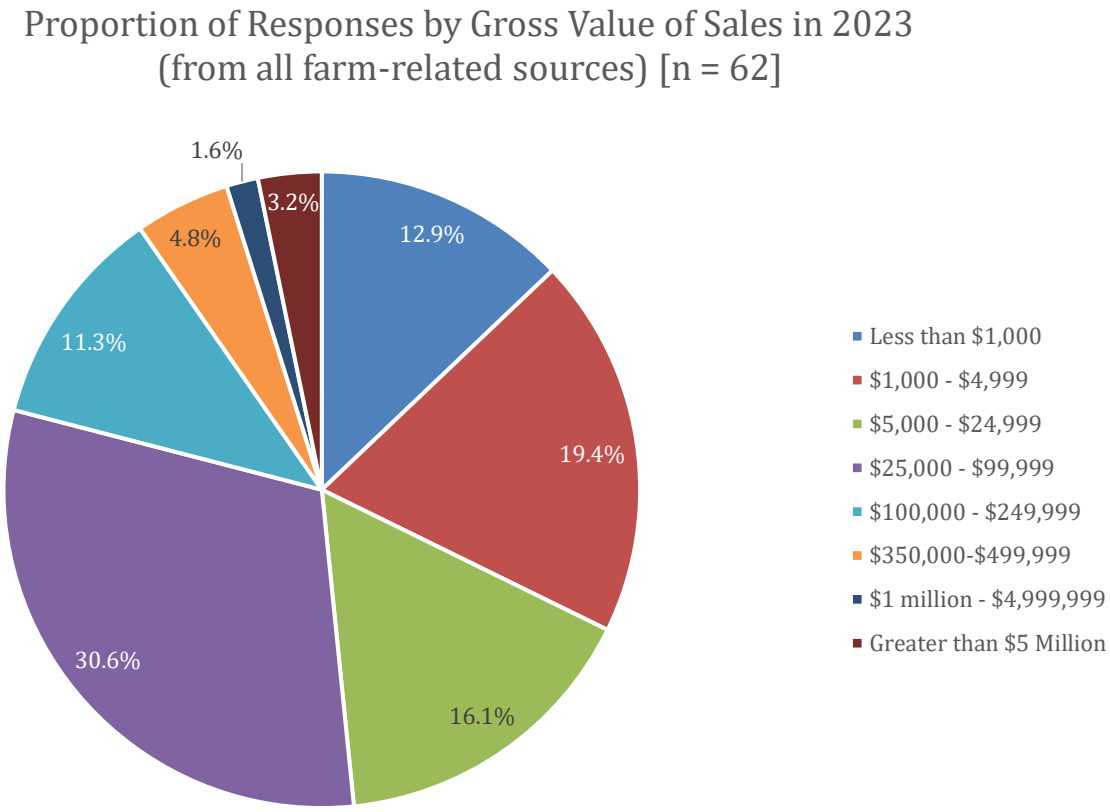

Figure 3. Gross sales from all farm-related sources in 2023

Figure 3 shows the proportional distribution of responses from South Carolina agritourism operations across categories of gross sales value. Approximately 90.3% of the 62 respondents who provided this information would likely fall within the USDA ERS classification of "small farms," as they reported less than $350,000 in gross sales for 2023. Notably, this includes 12.9% with less than $1,000 in sales and, thus, may not qualify as a farm operation under certain Federal program definitions. An additional 4.8%

would likely fall within the mid-sized farm category ($350,000 to $999,999 in sales), with 1.6% being large operations and 3.2% being very large operations.

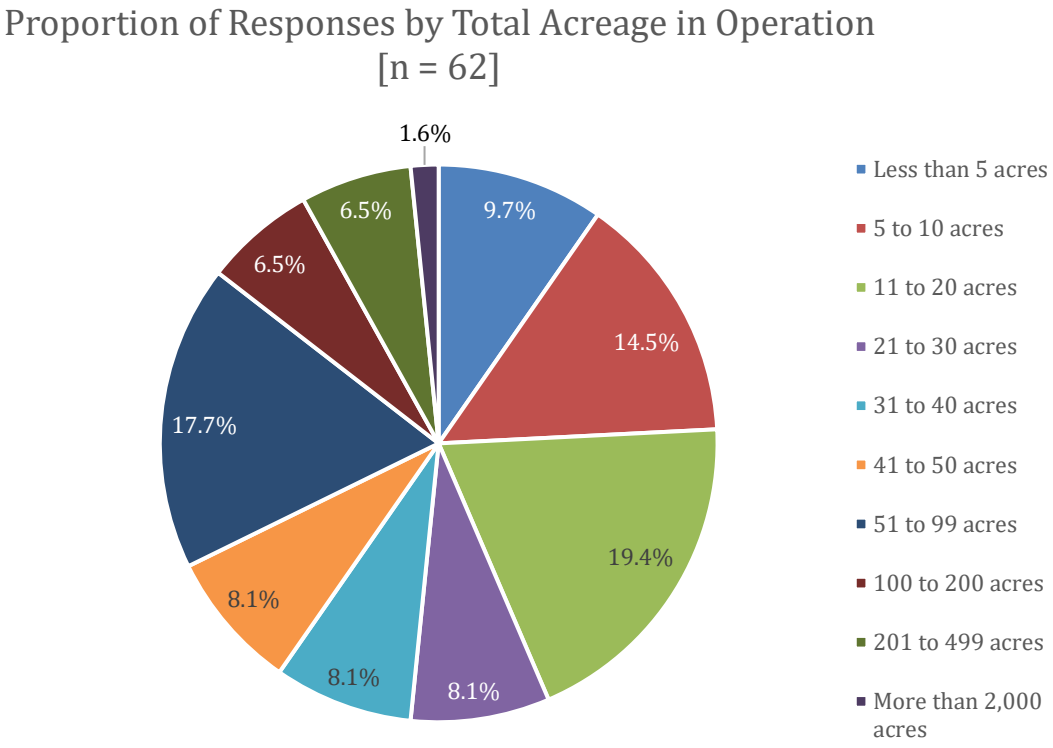

Figure 4. Total acreage reported in the operation for 2023

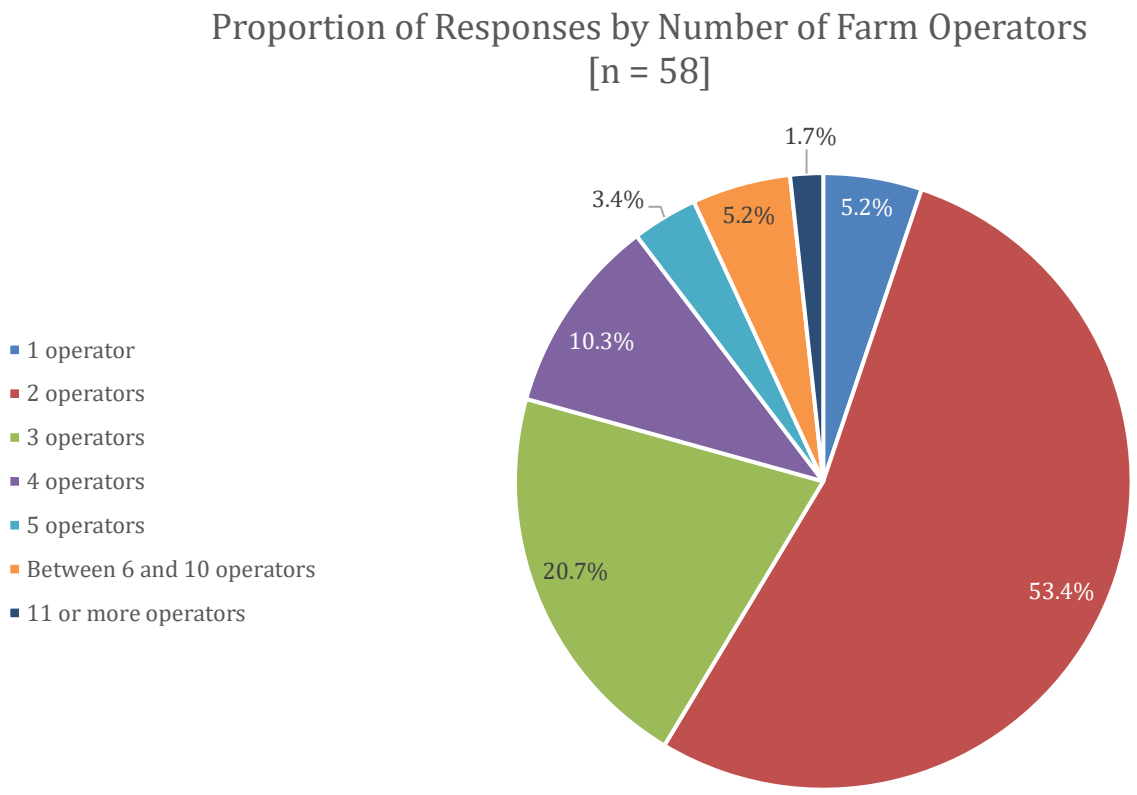

Figure 5. Number of farm operators making decisions for the operation in 2023

Category boundaries for farm size using land and operators are not well established. In Figure 4, we report the proportional distribution of responses across 10 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 South Carolina agritourism operations reported 50 acres or fewer under their control in 2023; 67.9% of the 62 responses to this question were at or below this common benchmark for "small farms." Some 30.7% reported between 51 and 499 acres, a common range for defining "mid-sized" operations. Only 1.6% of the agritourism operations would likely be considered large farms by acreage, having 500 or more acres. However, using acreage as a measure does not adequately capture the complexity of agritourism in South Carolina, where farm income and visitor engagement may not correlate directly with land size. Many successful agritourism operations do not require large acreages to host profitable activities, especially those focused on value-added experiences, events, and educational programming.

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 shows a slightly higher proportion indicating that the farm had two operators making decisions in 2023, at 53.4% of the 58 responses (Figure 5). However, only 5.2% of South Carolina agritourism operations in the survey had a sole operator. Just under one-third (31%) of agritourism farms reported 3 or 4 operators and 10.3% indicated 5 or more; compare these to 10.7% and 1.8%, respectively, estimated for all farms by USDA at the national level. Thus, compared to national estimates for the whole farm population, it appears South Carolina producers with on-farm agritourism enterprises rely on greater numbers of owner/operator

decision-makers, reflecting increased managerial scale and complexity, as many family-run operations often involve multiple family members managing various aspects of the business.

What types of activities are offered by agritourism operations?

The survey questionnaire posed questions to learn about the types of products grown or made on the farm and the types of agritourism activities offered that welcome visitors to the farm. Both questions included pre-populated options that respondents could select, and also allowed them to identify other items via a free-response field.

A total of 63 responses to the survey were classified as South Carolina producers. Figure 6 reports the proportion of responses that indicated different production types were present on the farm. More than one could be selected. Data indicate that 79.4% of South Carolina operations completing the agritourism survey produced animals and animal-related products; 63.5% grew fruits and vegetables in 2023; and 36.5% engaged in on-farm value-added activities. However, many successful agritourism operations in the state generate significant revenue through experience-based offerings that extend beyond traditional agricultural production, suggesting that many do not primarily focus on conventional crop or livestock enterprises at all, or they concentrate on those that might complement the agritourism business.

Other more common types of production occurring on South Carolina agritourism farms included production of nursery, flower, or Christmas trees (31.7%); and row or field crops (12.7%). Small percentages of farms produced non-food value-added products (3.2%); fiber and fiber products (2.5%); tree nuts (1.6%); and aquaculture (1.6%). Overall, it appears many agritourism operations are likely involved in diversified agricultural practices, producing multiple types of goods on their farm or engaging in value-added strategies; however, the extent to which small-acreage farms in South Carolina rely heavily on value-added products seems underreported, potentially underestimating their economic contributions and adaptive strategies.

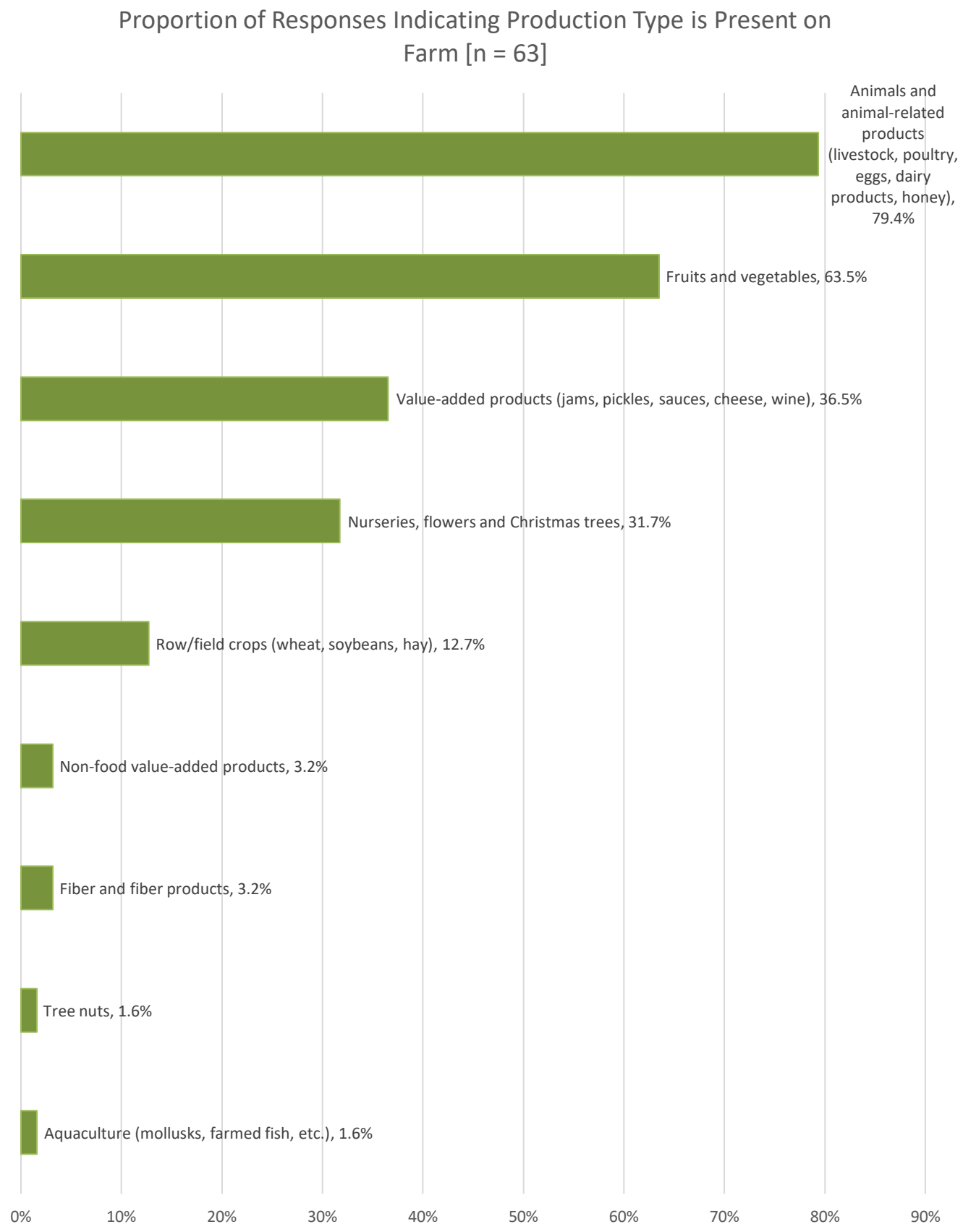

Figure 6. Type of production or activity is present on farm in 2023

Agritourism operations also have many options and strategies for welcoming visitors to the farm and crafting experiences for them. Figure 7 reports the proportion of the 63 responses from South Carolina producers in the survey indicating a 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; 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.

This is critical as results from South Carolina producers in our sample indicate that one of the two most common agritourism activities – indicated by 76.2% of respondents – in 2023 was sales made directly to consumers on-farm via on-site stores or stands, Community Supported Agriculture (CSA) subscription pick-up points, etc. Educational activities such as tours or workshops (76.2%) and events (54%) were also common. Least common among South Carolina farms were hunting (6.3%), sales of prepared food (20.6%), and accommodations and lodging (25.4%). Wellness activities (e.g., forest bathing, yoga, wellness retreats) emerged as a category based on free responses; however, no South Carolina farms reported offering this type of activity, suggesting a potential gap in diversification. This highlights the

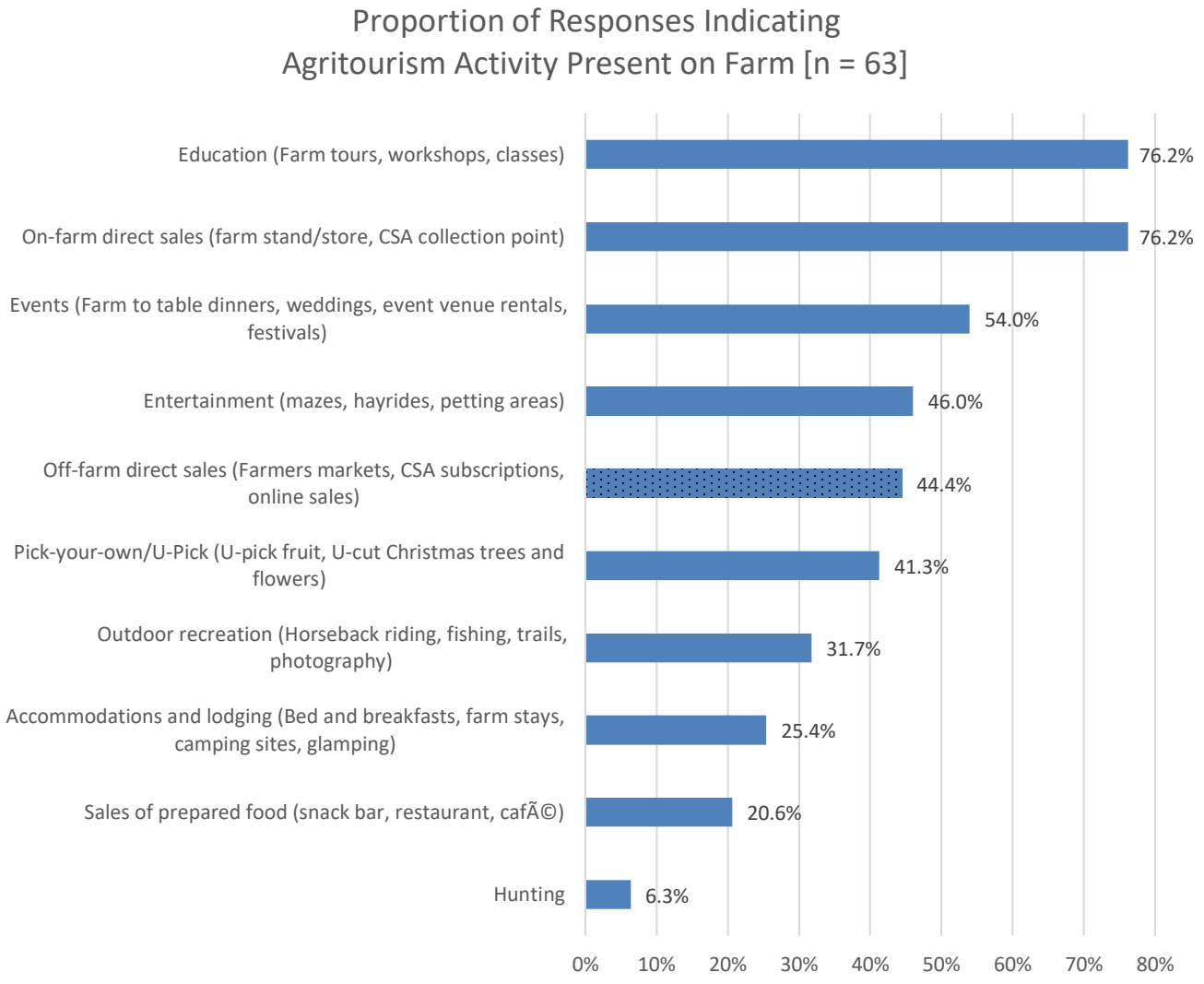

Figure 7. Type of agritourism activity present on farm in 2023

need to distinguish between direct sales as a marketing channel and agritourism as an experiential activity, particularly when assessing emerging opportunities within the sector.

Thus, many of the experiences offered to farm visitors relate to selling farm products or educating the public about agriculture and farming practices, though other types of tourism, hospitality, and recreation services may also be available at some operations. High-revenue seasonal events may be undervalued in the report, potentially underrepresenting their economic and experiential significance within the agritourism sector.

What are the economic impacts of agritourism activities on 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 enterprises themselves are profit contributors to the whole-farm bottom line. Respondents were given an opportunity to provide information about their operations on these topics.

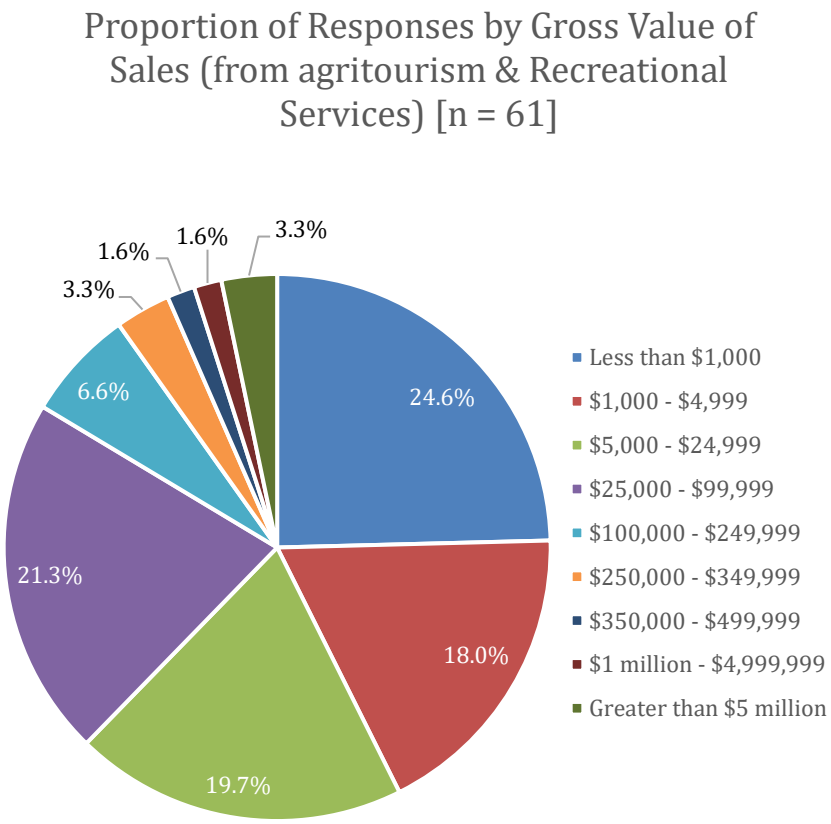

Figure 8. Gross sales value from agritourism or recreational services in 2023

Figure 8 at right reports the distribution of South Carolina respondents across categories of gross sales value obtained in 2023 from agritourism and recreational services. For 24.6% of the subsample, agritourism accounted for less than $1,000 in sales. The majority of farms (59%) had between $1,000 and $99,999 in agritourism sales. Approximately 11.5% of responding farms saw 2023 sales from tourism and recreation activities ranging from $100,000 to $1 million, and only 4.9% had more than $1 million.

Many South Carolina agritourism enterprises operated at a loss or break-even (40.3%) or contributed less than $1,000 (16.1%) in net income to the farm. Another 32.3% reported between $1,000 and $99,999 in profit from agritourism and recreational services in 2023. Just 11.3% reported higher net earnings, in excess of $100,000 from agritourism.

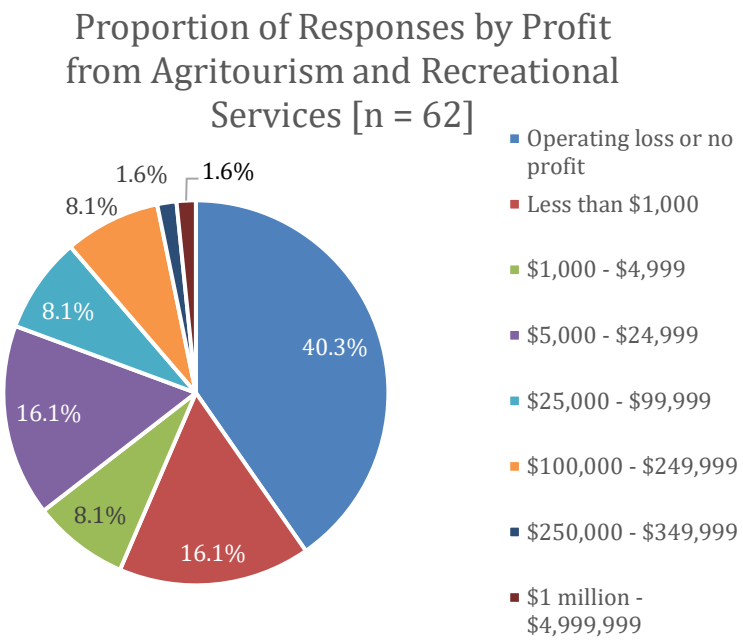

Figure 9. Profit (net income) from agritourism or recreational services in 2023

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

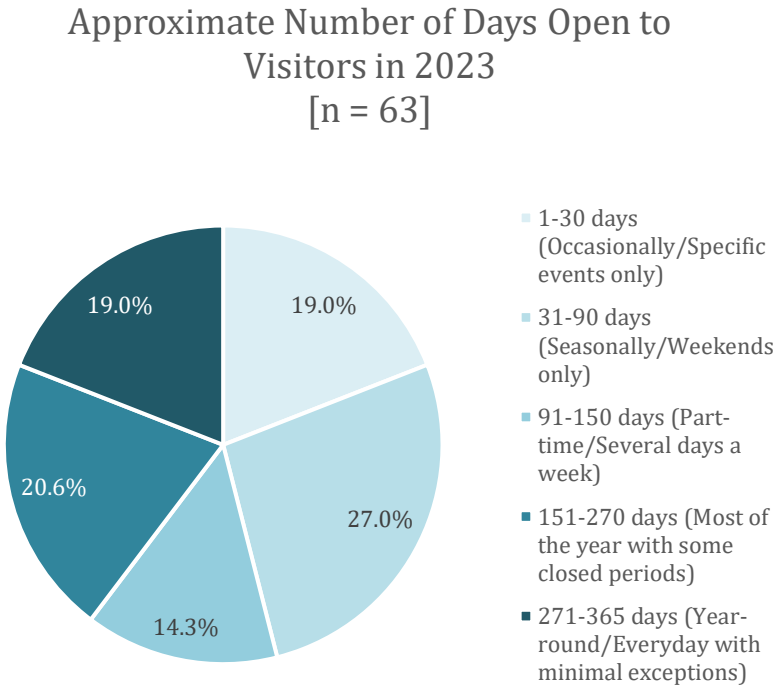

Figure 10 Number of days open to visitors in 2023 (approx.)

Most agritourism farms were open to visitors part-time (150 days or fewer) in 2023. Figure 10 reports the distribution of responses across five different timing windows presented in the survey as part of a question about the approximate number of days the farm was open for visitor activities as part of agritourism operations. These results indicate that, not unexpectedly, agritourism is likely a supplemental activity engaged in only part of the year by many farms; however, this characterization may overlook the reality that many successful South Carolina farms generate a significant portion of their annual revenue through agritourism, suggesting it is not merely supplemental but central to their business models.

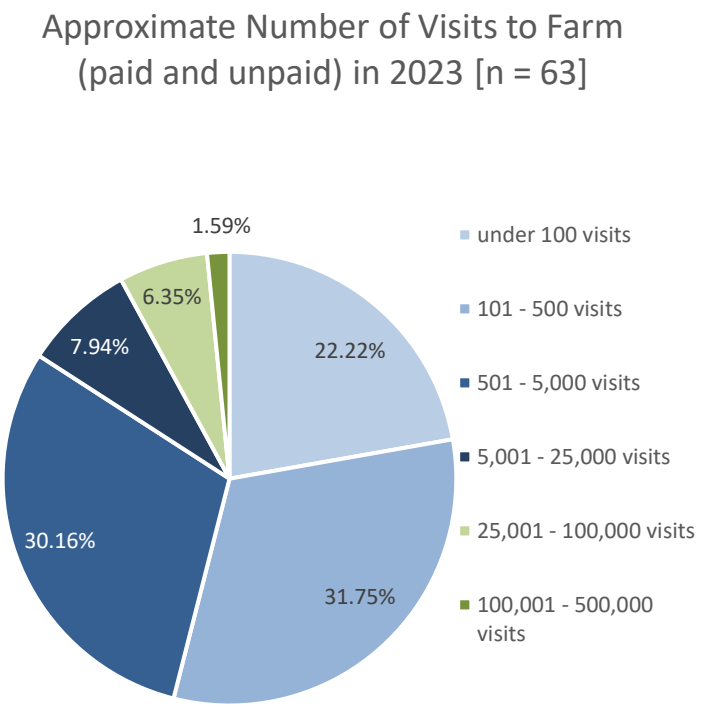

Figure 11 Proportion of responses by number of visits to farm

This is further supported by data in Figure 11, which reports the proportion of responses across categories for number of annual visits to the farm – both paid and unpaid – in 2023. Approximately 84.1% of respondents had fewer than 5,000 total visits that year. This included almost one-quarter (22.1%) of the South Carolina sub-sample who had fewer than 100 visits.

Notably, 40.7% of the operations in the sub-sample also had fewer than five years of experience in agritourism activities, with an additional 32.2% having between five and ten years of experience in agritourism (Figure 12). This highlights the relative newness of agritourism enterprises among specialty crop sub-sample farms. It also indicates that a sizeable number of farms likely instituted agritourism activities shortly before, during, or immediately after the COVID-19 pandemic.

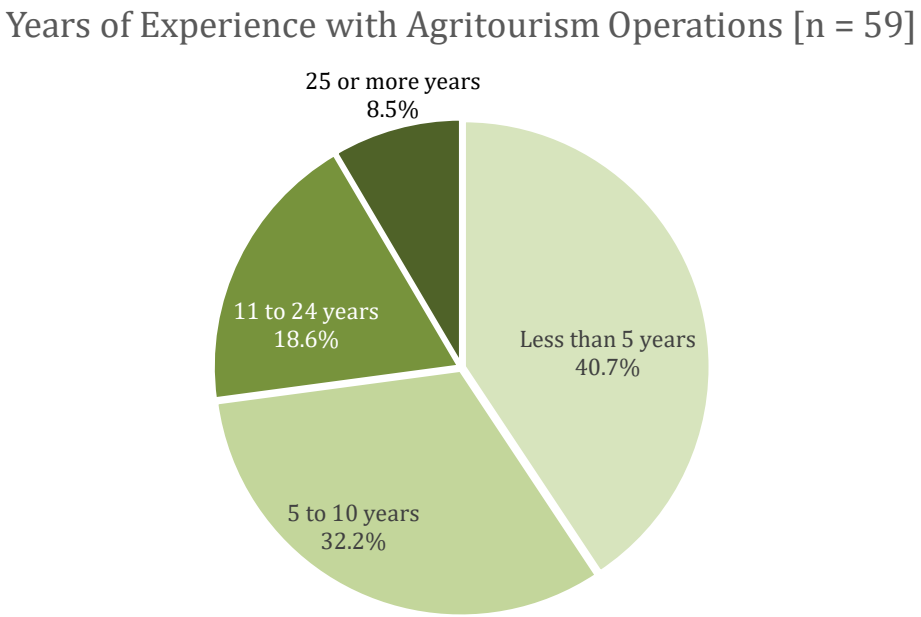

Figure 12. Years of experience with agritourism at this operation

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 ratings 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 (Figure 13), an evaluation of key complementary tourism features of the destinations in which they operate (Figure 14), their agreement with a set of statements describing the socio-cultural environment in which they operate (Figure 15), and their views on how challenging different facets of the regulatory landscape are to their agritourism business (Figure 16).

Financial capital – such as to promote agritourism in a region or to directly fund producers with agritourism operations – was the most challenging environmental aspect for South Carolina respondents, with 42.8% indicating it as very or extremely challenging. This was followed by political and governance capital (33.4% selecting very or extremely challenging). These, along with built/physical infrastructure, were the three aspects that a majority of respondents rated as at least moderately challenging. Agritourism operators in the South Carolina subsample generally rated market conditions as the least challenging factor in the development of their tourism-focused enterprises, with over 80% of respondents rating this as only slightly challenging or posing no challenge at all.

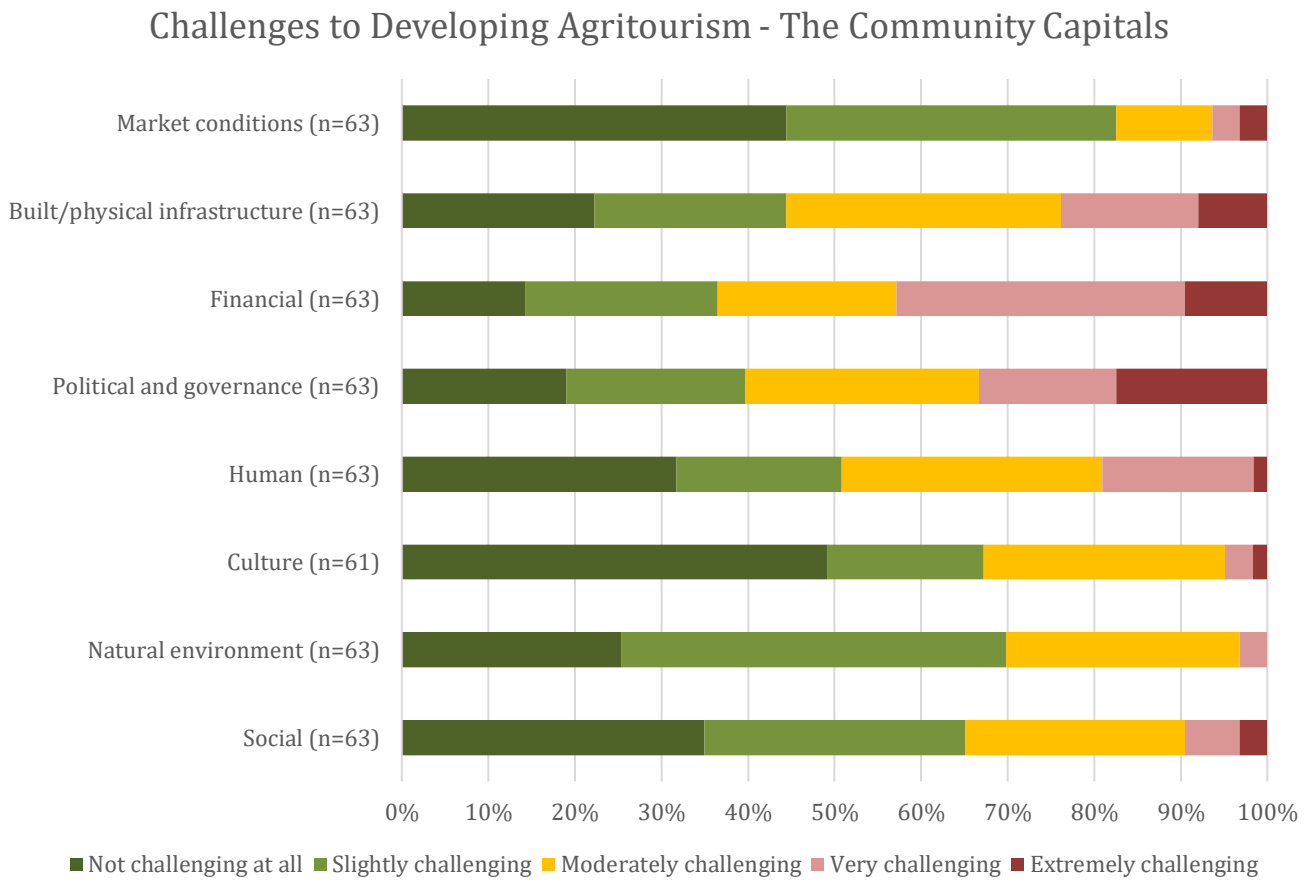

Figure 13. Distribution of respondent ratings of the challenge posed by various entrepreneurial ecosystem features using an augmented Community Capitals Framework

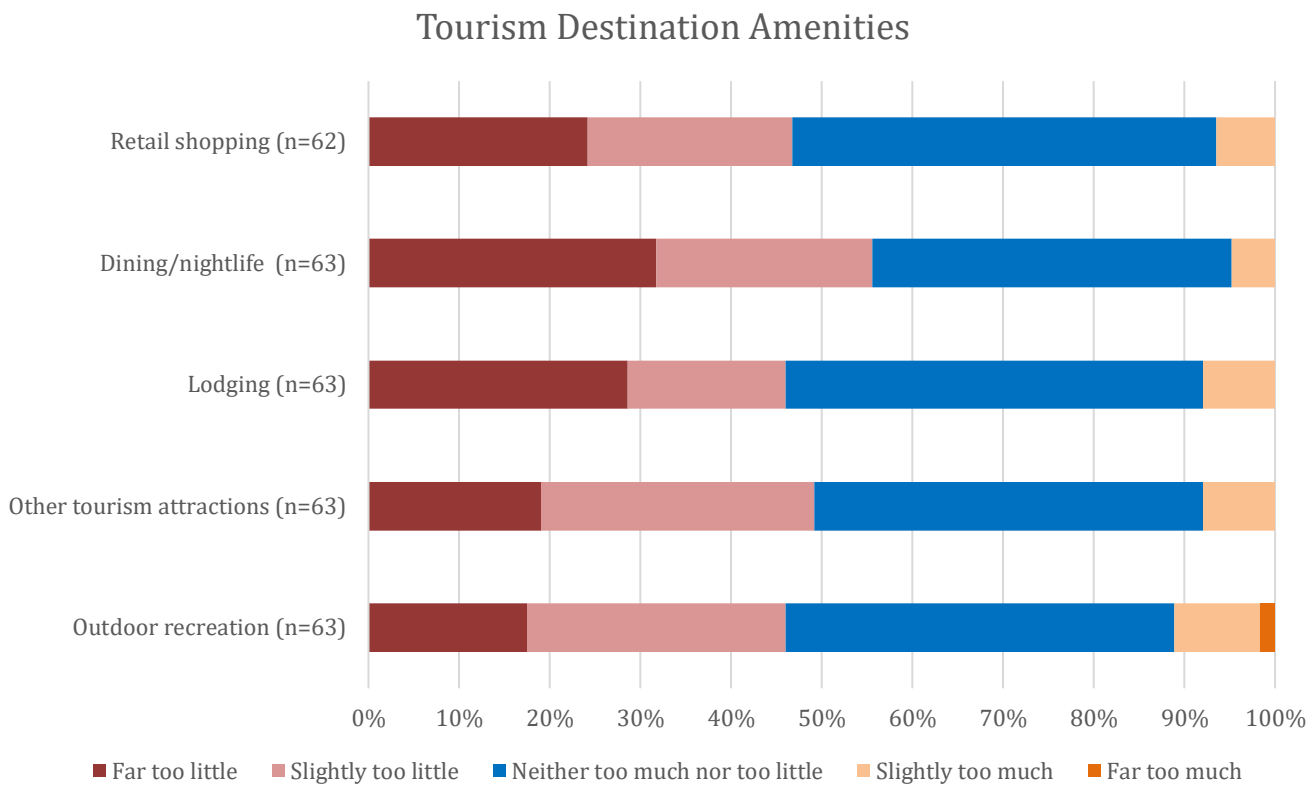

Figure 14. Distribution of respondent ratings of tourism destination amenities in their region

When evaluating a set of five tourism destination amenities within their region, a plurality of respondents indicated there was neither too much nor too little. Very few (less than 12%) 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 subsample respondents are located in urban or peri-urban counties (recall Figure 1). South Carolina respondents indicated dining and nightlife (55.5%), other tourism attractions (49.2%), and retail shopping (46.8%) amenities are the most likely to be under-developed (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 also highlights the importance of developing economic vibrancy in smaller towns and villages near farming communities; however, a key challenge to these strategies is the significant cost of developing on-farm kitchens and the substantial investments required in kitchen infrastructure.

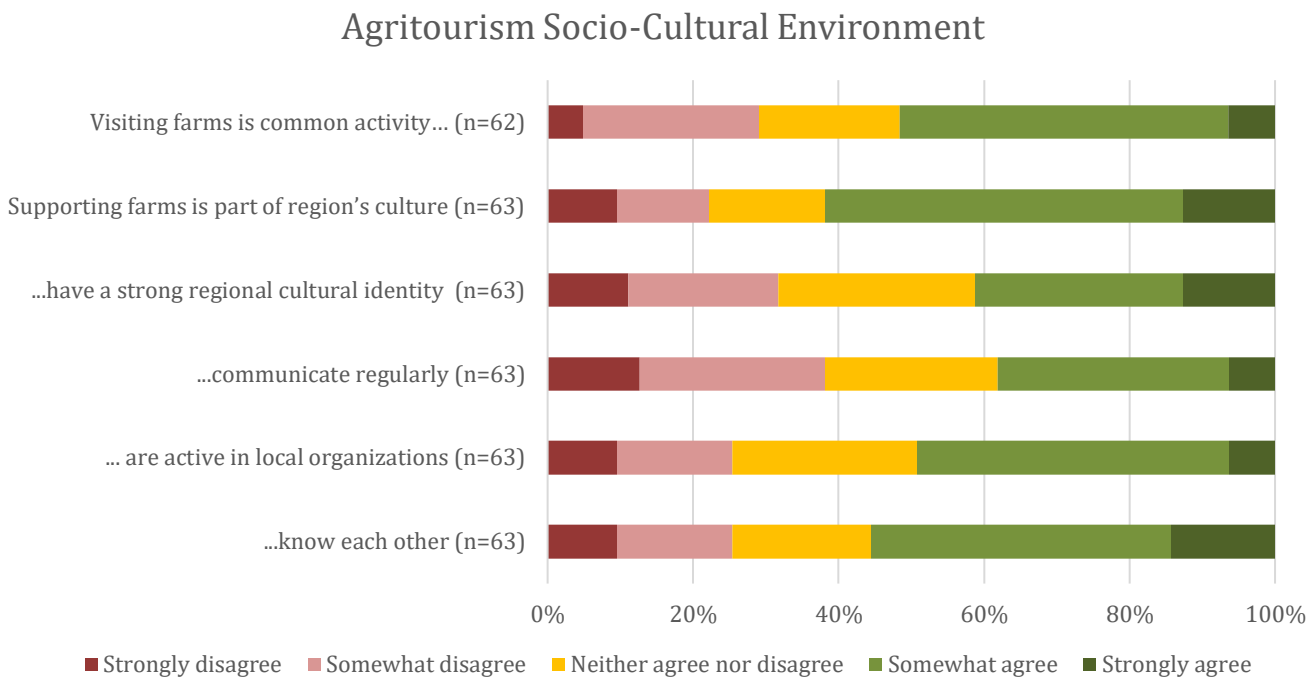

Figure 15. Distribution of respondent ratings of agritourism socio-cultural environment

A majority of respondents agreed with statements positively evaluating the consumer-focused elements of the socio-cultural environment: 61.9% somewhat or strongly agreed that supporting farms is part of their regional culture, and 51.7% said this in relation to visiting farms being a common activity for regional residents. Similarly, 55.6% somewhat or strongly agreed that agritourism operators around them know each other, an indicator of entrepreneurial networks within their region's agritourism industry. However, results indicate that among the South Carolina producer subsample, these agritourism operator networks may be largely composed of weak social connections. Approximately 41.3% agreed that agritourism operators near them have a strong regional cultural identity, 49.2% agreed these operators are active in local organizations, and just 38% indicated these operators communicate regularly. These three facets are indicators of strong ties, often associated with developing regional brands and collective strategies that help drive destination development. However, many agritourism producers operate on a smaller scale, which can make regular communication and involvement in local organizations more challenging. While local collaboration exists, it may not be fully captured in survey responses about formal organizational involvement, suggesting that informal networks and interactions play a significant role in these operations' development.

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 particularly for those farms transitioning from predominately product-oriented strategies to mixed product-service strategies. To evaluate this complexity, survey respondents rated 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 South Carolina agritourism operations; 63% indicated it was a moderate or greater challenge. Designating agritourism operations as retail sites – which often impose specific infrastructure and facilities requirements on businesses – was the second most challenging, with 49.2% selecting moderately or greater. When looking at regulatory items that respondents indicated as very or extremely challenging, these remained the two most challenging regulatory items. Building code regulations were not far behind, with 27.9% indicating this as very or extremely challenging. These challenges are compounded by the fact that local regulations can vary significantly across political boundaries, creating additional complexity for agritourism operators.

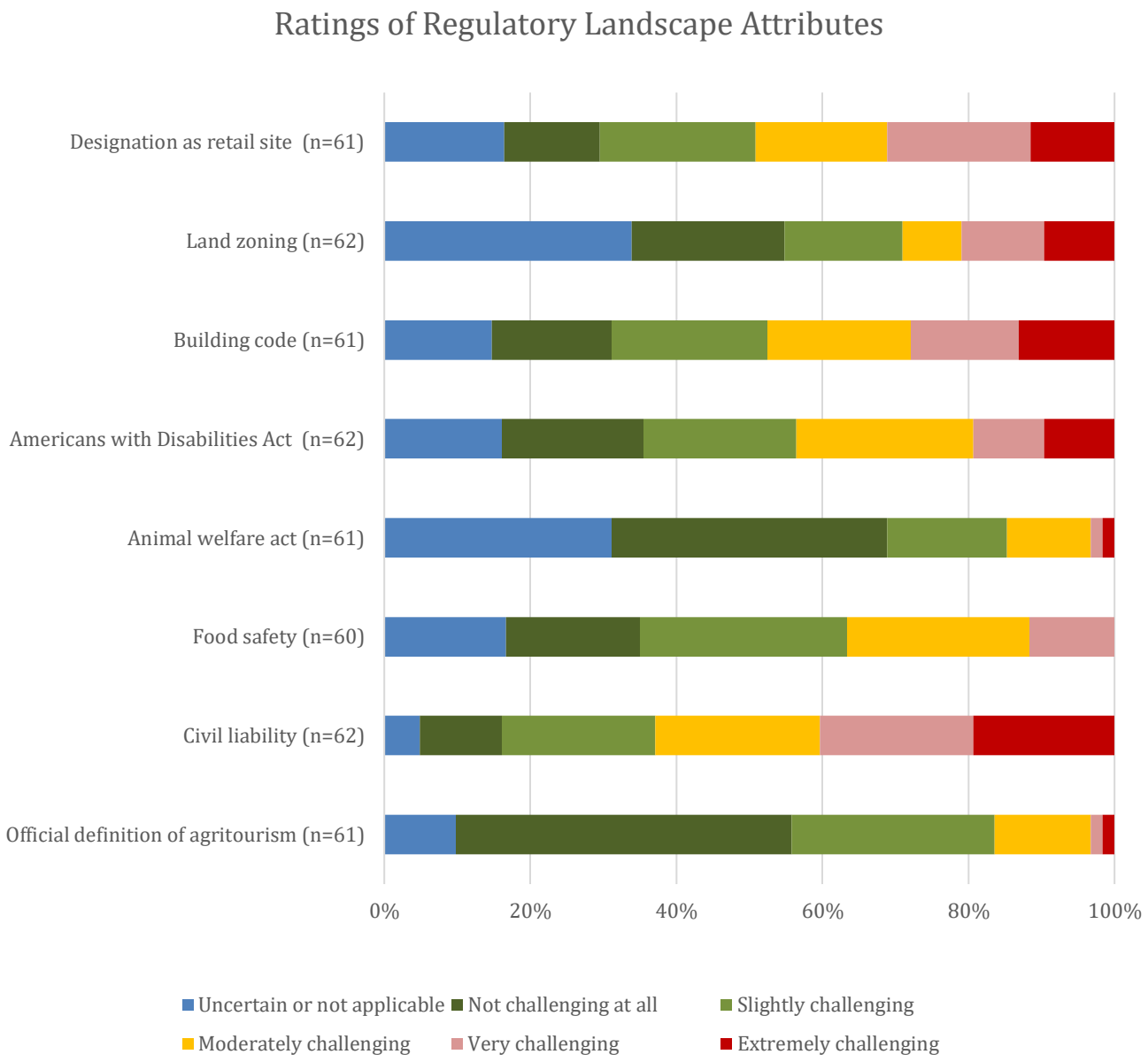

Figure 16. Distribution of respondent ratings of regulatory landscape attributes

What are agritourism operations' experiences and practices concerning regulations?

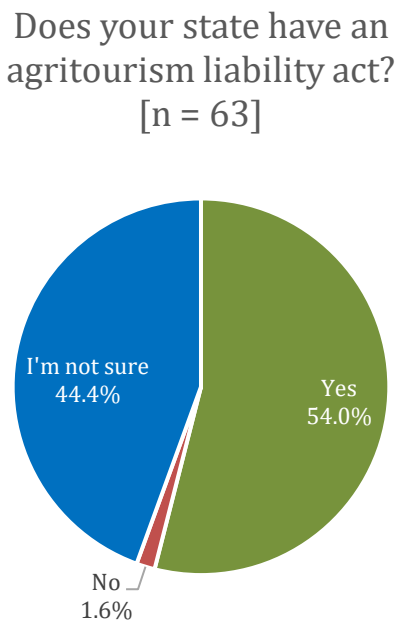

Figure 17. Does your state have an agritourism liability act?

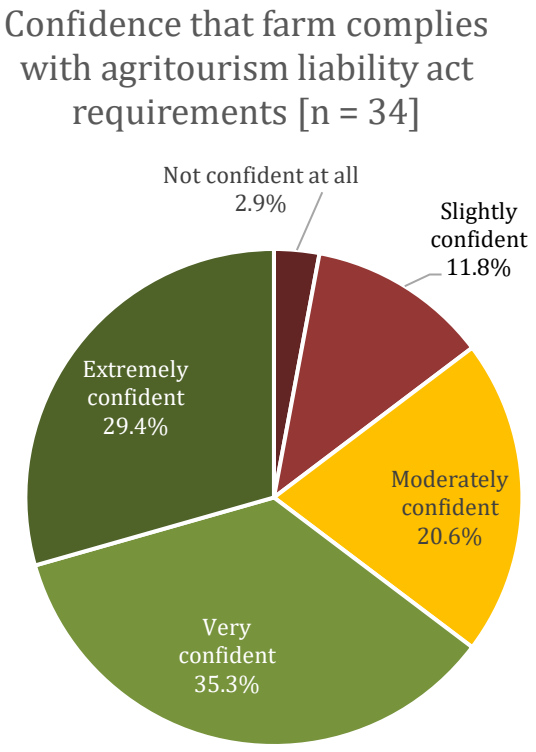

Figure 18. Confidence that farm has complied with requirements of local agritourism liability laws

After rating regulatory landscape attributes (recall Figure 16), survey respondents were presented a series of questions designed to better understand their practices and business readiness on several key issues. This included civil liability, compliance with zoning and other regulations relevant to their agritourism enterprise, and experience of disputes.

More than half of respondents indicated awareness, but a significant minority (44.4%) of respondents indicated they are unaware ("I'm unsure") whether their state has an agritourism liability act in place [See Figure 17 at left.] 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 that must be effectively managed. Some 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. Many of these statutes also require businesses to take specific actions—such as posting a sign with designated language at certain points—to benefit from the law. However, awareness of these requirements may be more limited among newer or smaller operations in rural areas that have not yet fully transitioned into agritourism or those that only offer occasional public events, potentially hindering their ability to fully comply and capitalize on available benefits.

Respondents who answered "yes" to the question "does your state have an agritourism liability act" were then asked to rate their level of confidence that they have complied with all its requirements. Figure 18 reports the distribution of responses to the ratings question. Among South Carolina producers who believe their state has an agritourism liability act, 64.7% are very or extremely

confident they are in compliance with the legal requirements. Around one-fifth (20.6%) are moderately confident of their compliance, and – importantly – 14.7% are slightly or not at all confident of compliance.

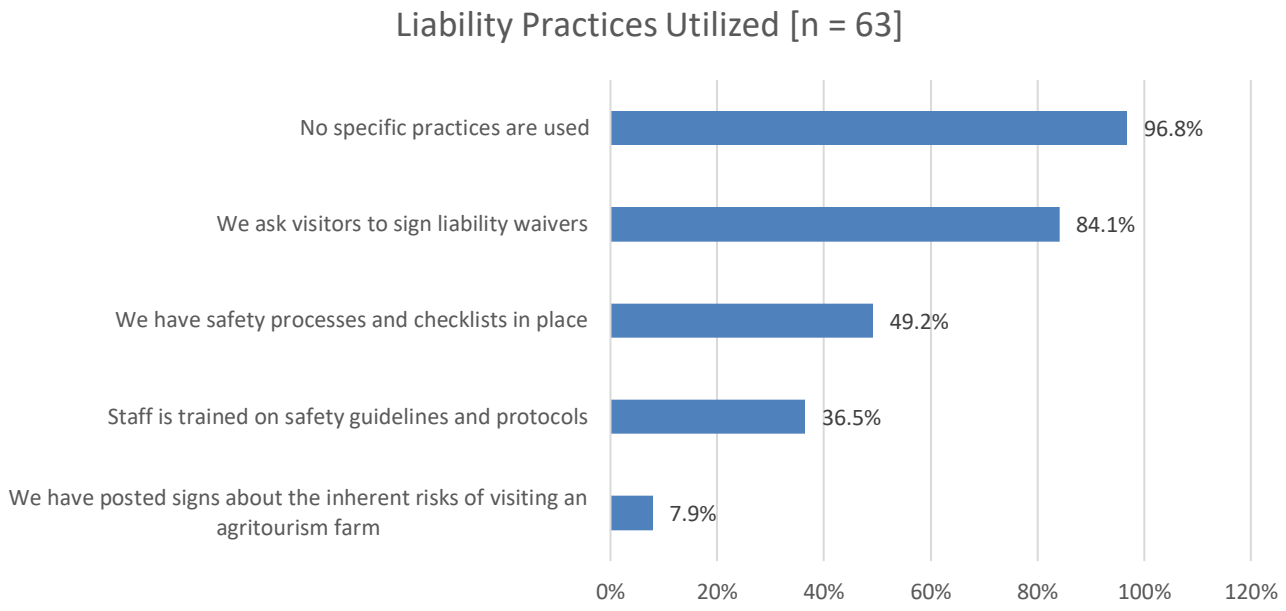

Figure 19. Liability practice utilized

Apart from direct legal protections to civil liability, farms can engage in other practices that reduce or mitigate their liability or the risk of harm to visitors engaged in agritourism activities. Figure 19 presents data on the proportion of South Carolina producers who indicated engaging in a given 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. Visitors being asked to sign liability waivers was the most common practice, with 84.1% of sub-sample valid responses selecting this option. Fewer than half of respondents indicated their farms had instituted safety processes and checklists (49.2%) and staff training on safety guidelines and protocols (36.5%). Notably, only 7.9% of respondents indicated they had posted signs about the inherent risks of visiting agritourism operations – a common requirement in many state agritourism liability acts to benefit from protection.

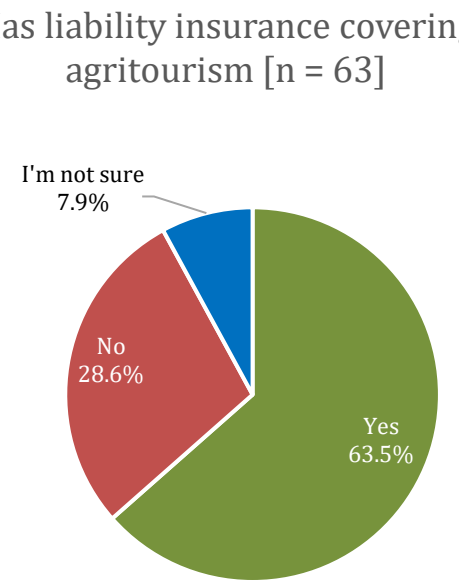

Figure 20. Proportion of respondents indicating whether their farm has liability insurance covering the agritourism operation

In a separate question, respondents were asked about another risk management practice: carrying an insurance policy with liability coverage for the agritourism operation. In many places, this may be a special rider on an insurance policy with an additional premium to cover the specific types of activities offered by the farm. Of the 63 valid responses from South Carolina producers to this question, 63.5% indicated that they have liability insurance that specifically covers the agritourism operation [See Figure 20]. While this coverage rate seems high for agritourism operations, considering the diverse nature of the agritourism sector in South Carolina, a smaller proportion—28.6%—reported not having such insurance, and 7.9% were uncertain if their existing coverage included agritourism activities.

These proportions are notable given the implications for farm risk management, especially if operations do business as sole proprietorships and liability conveys to farmers' personal assets.

Compliance with zoning regulations may also be challenging for agritourism operations, particularly if farms are located in areas of increasing urban sprawl or when zoning laws create specific conditions that must be met to host certain activities. Thus, the questionnaire asked participants to rate their experience with zoning compliance. Of the 63 valid responses from the South Carolina producer sub-sample, 63.5% indicated they have had no difficulty, and 12.7% rated their experience as "some difficulty" – the lowest possible rating categories. Approximately 15.9% indicated they have had significant difficulty, including 12.7% for whom difficulty in complying with zoning laws is ongoing. Some 3.2% of respondents preferred not to answer the question about experiencing difficulty with zoning [See Figure 21]. A major challenge in many regions, however, is the significant variation in local and county regulations, which can create additional barriers for agritourism operators navigating zoning requirements.

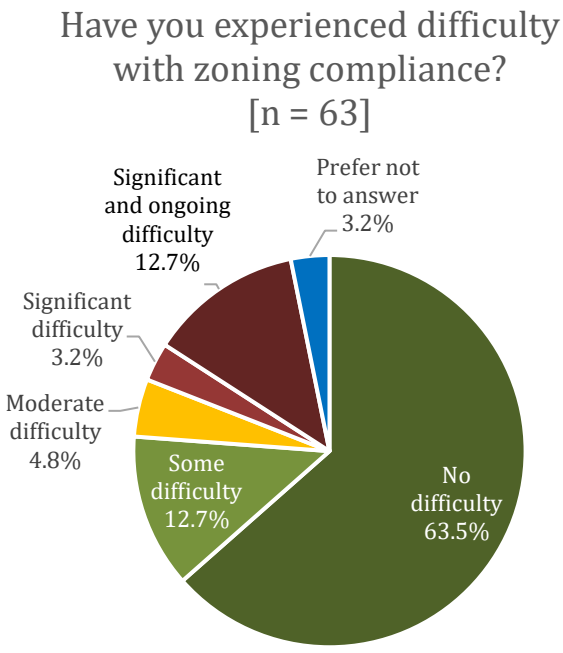

Figure 21. Degree of difficulty in complying with zoning

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 22 reports the ratings distribution among the 63 valid observations in the South Carolina producer sub-sample. In the generalized context, findings indicate producers lack confidence that they know about and have complied with applicable regulations; 15.9% indicated they were not at all confident and 27% indicated they felt only slightly confident. Additionally, 28.6% 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.

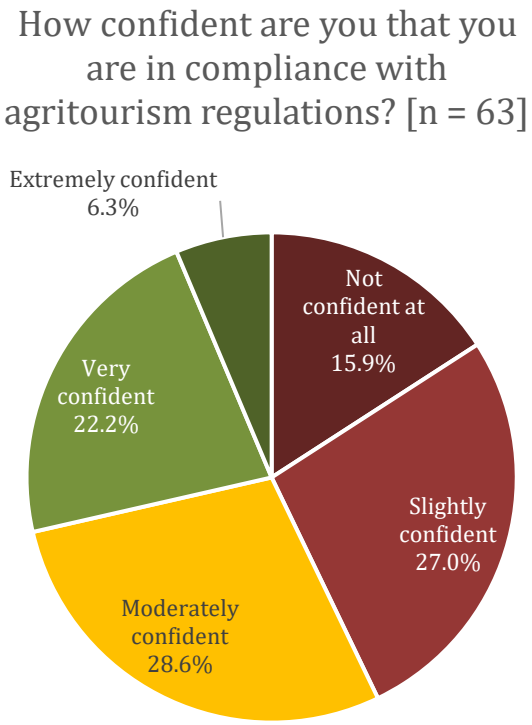

Figure 22. Distribution of respondent ratings of confidence in general knowledge and compliance with agritourism regulations

Disputes with various parties – regulators, zoning boards, neighbors, employees, customers, etc. – may arise in the course of any business activities. Agritourism operations may experience disputes over impacts on communities, disgruntled customers, differences in understanding of legal and regulatory issues, the boundaries of property, and more. The question "relating to your agritourism operation, have you experienced significant disputes where you or the other party has suggested legal action or litigation?" was posed to survey respondents [See Figure 23]. Among South Carolina producers, 63 provided valid responses, of which 87% indicated they had not experienced such significant disputes. Approximately 2% preferred not to answer, while 11% indicated yes, their agritourism operation had experienced at least one significant dispute.

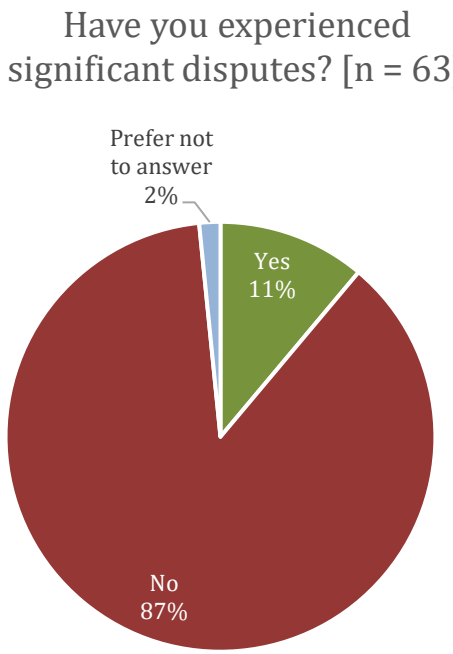

Figure 23. Experienced significant disputes related to their agritourism enterprise?

Respondents were also presented with a question asking which types of disputes they had experienced (Figure 24). Five pre-populated options were provided for selection, along with the choice to indicate that no disputes were encountered, that they preferred not to answer, and to provide a free response. Most respondents (73.7%) reported they had not experienced any disputes, and 1.8% indicated they preferred not to answer. Figure 23 reports the dispute types most commonly encountered. Conflicts with neighbors were reported with the greatest frequency among the South Carolina subsample, including issues such as noise, smells, or traffic (10.5%), and

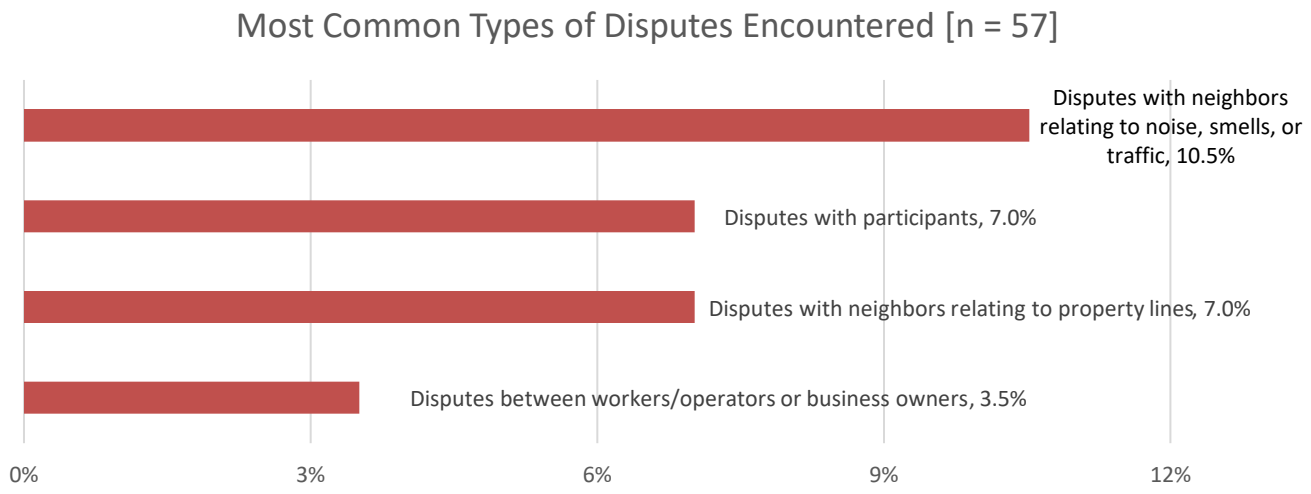

Figure 244. Proportion of respondents indicating a given type of dispute was encountered

disputes relating to property lines (7%). Participant (i.e., customer or visitor) disputes (7%) and disputes between workers/operators or business owners (3.5%) comprised the remainder. However, many producers might avoid discussing or documenting these disputes for fear of legal ramifications or reputational damage, potentially underreporting the true frequency and scope of conflicts.

What support organizations and programming interest agritourism operators?

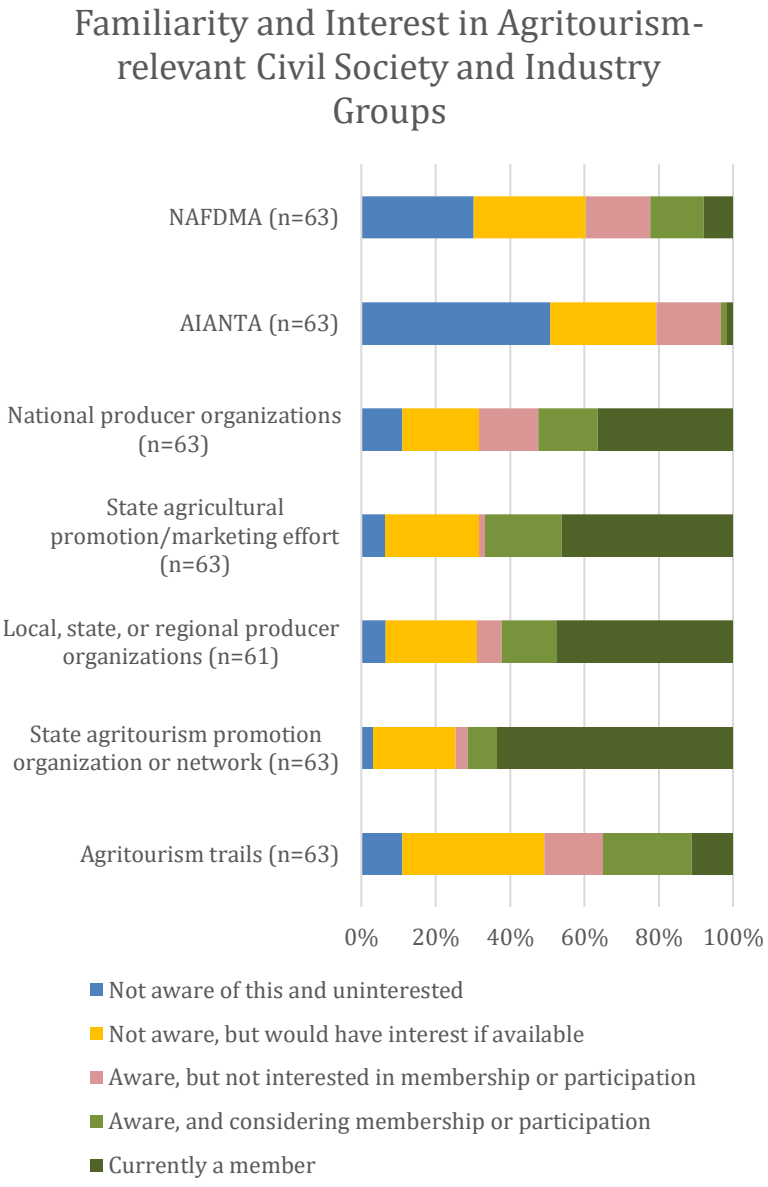

Figure 25. Distribution of respondent ratings of familiarity and interest in agritourism-relevant civil society and industry groups

A variety of organizations and agencies exist within the agritourism support ecosystem that provide beneficial 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 25 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 association, and the American Indian Alaska Native Tourism Association (AIANTA). These organizations requested or agreed to be included in the survey. A total of 63 respondents provided at least one rating for the organizations included in the question.

Within the South Carolina producer sub-sample, agritourism operations are most frequently (63.5%) current members of state agritourism promotion organization or network (e.g., South Carolina Agritourism Association). This is followed by local, state, or regional Producer organizations at 47.5%, and state agricultural promotion/marketing efforts – such as Certified South

Carolina – at 46%. Roughly similar proportions of South Carolina producers indicated they are not aware of but would have interest in participating in NAFDMA (40.5%), agritourism trails (37.3%), or a local, state, or regional producer organization (30.8%) if available. A sizeable proportion also expressed awareness and active consideration of membership in local, state, or regional producer organizations and state agritourism promotion organizations or networks. Utilizing the organizations noted to reach current members for agritourism support provision holds immediate promise, as does assisting South Carolina producers in connecting with or founding them in regions where they do not exist. However, many South Carolina producers are not aware of NAFDMA, especially in comparison to more localized efforts such as the SC Ag + Art Tour or the SC Agritourism Association. Given this, these more "local" programs may prove to be a more relevant organization for South Carolina producers, particularly those just starting out in agritourism or looking to enhance local marketing efforts.

Figure 25 also provides data on South Carolina producers' perspectives on a growing tool for agritourism-focused destination management and promotion – the local agritourism "trail." Most commonly known among the wine-making and vineyard industry ("wine trails"), sector-specific and diversified sector trails have emerged across the U.S. and abroad. Among the sub-sample, only 11.1% of respondents indicated they are current members of trails, but 61.9% of respondents indicated some interest in membership, either that they are currently unaware of a trail in their region but would have interest if available (38.1%) or that they are aware of a regional trail and are actively considering membership (23.8%). Intriguingly, 27% indicated they have no interest in agritourism trails, including 15.9% 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 specialty crop producers would find helpful? Results of the survey provide insight to this question, shown in Figure 26. Unsurprisingly, given the findings previously presented in Figure 13, financial assistance is the most frequently indicated, with 82.5% of the 63 valid responses selecting this option. This is followed by policy advocacy (66.7%). Marketing assistance (65.1%), technical assistance (65.1%), help with legal issues (65.1%), and networking and event coordination (60.3%) all received relatively similar proportions of interest and were indicated by a majority of respondents.

SC Ag + Art Tour, developed by Clemson Extension, is a prominent agritourism initiative in South Carolina. It is already offering significant marketing and event coordination support for agritourism producers in the counties where it operates. This tour connects farmers with local consumers, providing marketing platforms, increasing visibility, and building relationships. The tour also offers networking opportunities for farmers and offers them a chance to showcase their products during the event, making it a critical resource for producers seeking exposure and business growth.

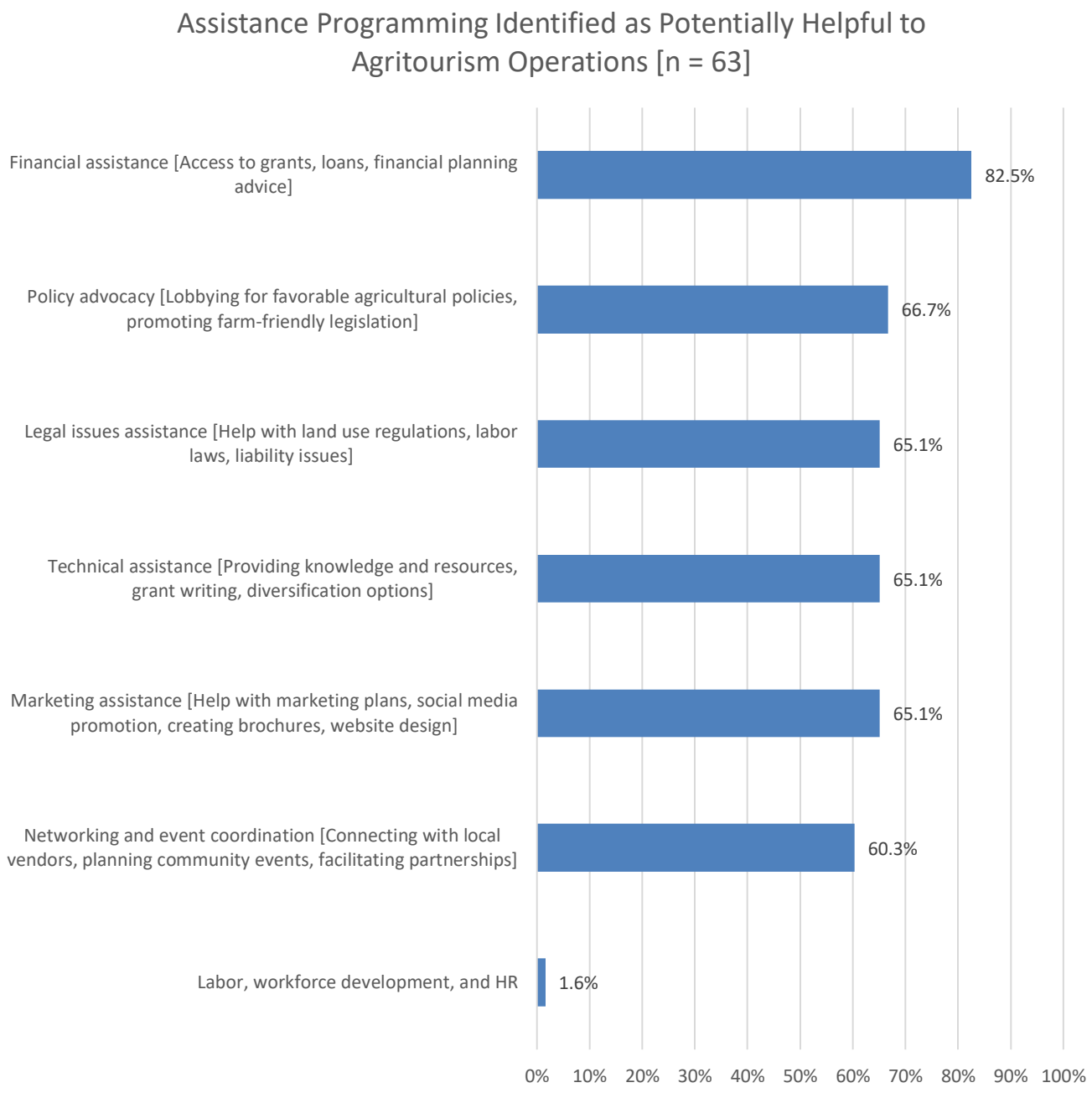

Figure 26. Proportion of respondents indicating given type of assistance would be helpful in developing agritourism enterprise

Similarly, respondents were asked what types of financial programs they used during 2023 to support the development of their agritourism enterprises. Figure 27 depicts the proportion of the 62 responses provided selecting different options. Overwhelmingly, South Carolina producers indicated they did not receive any grants or loans in 2023 (75.8%), and some 25.8% also indicated they were unaware 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 12.9% indicating they received grants, while equal proportions reported obtaining loans (1.6%) or in-kind technical assistance or marketing dollars (1.6%). No respondents reported receiving donations via fundraising.

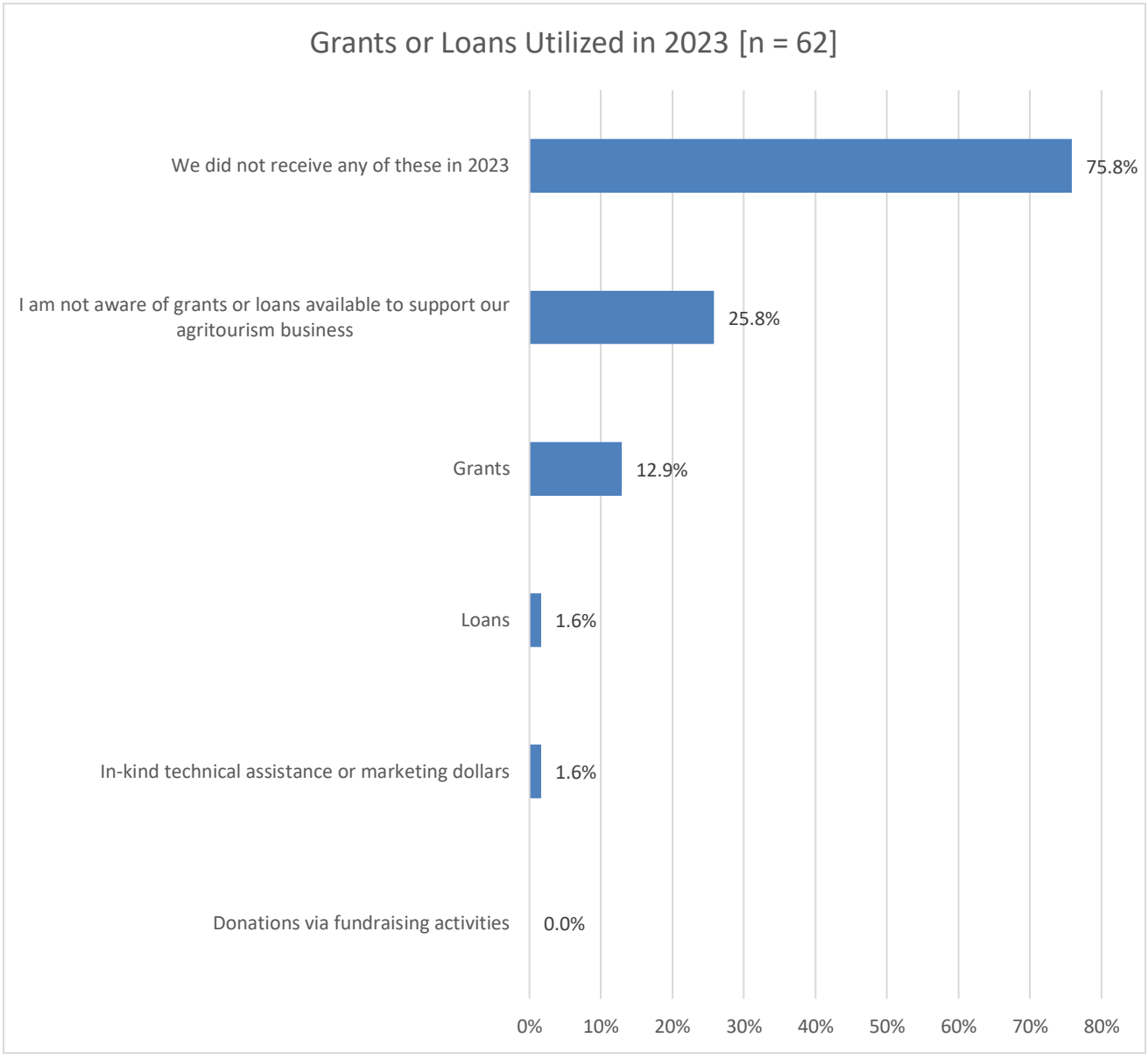

Figure 27. Proportion of respondents indicating given type of financial support utilized in 2023

How do operators view the future of agritourism?

Despite challenges and barriers, agritourism operators within the South Carolina sub-sample have a generally positive view of their agritourism operation's future (Figure 28). When asked to rate three aspects of the future (in 5 years), 80.6% of South Carolina producers felt the number of visitors to their operation would increase moderately or significantly, 74.2% felt that way about their operation's profitability, and 72.6% 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 5% of respondents expected these to decrease at all.

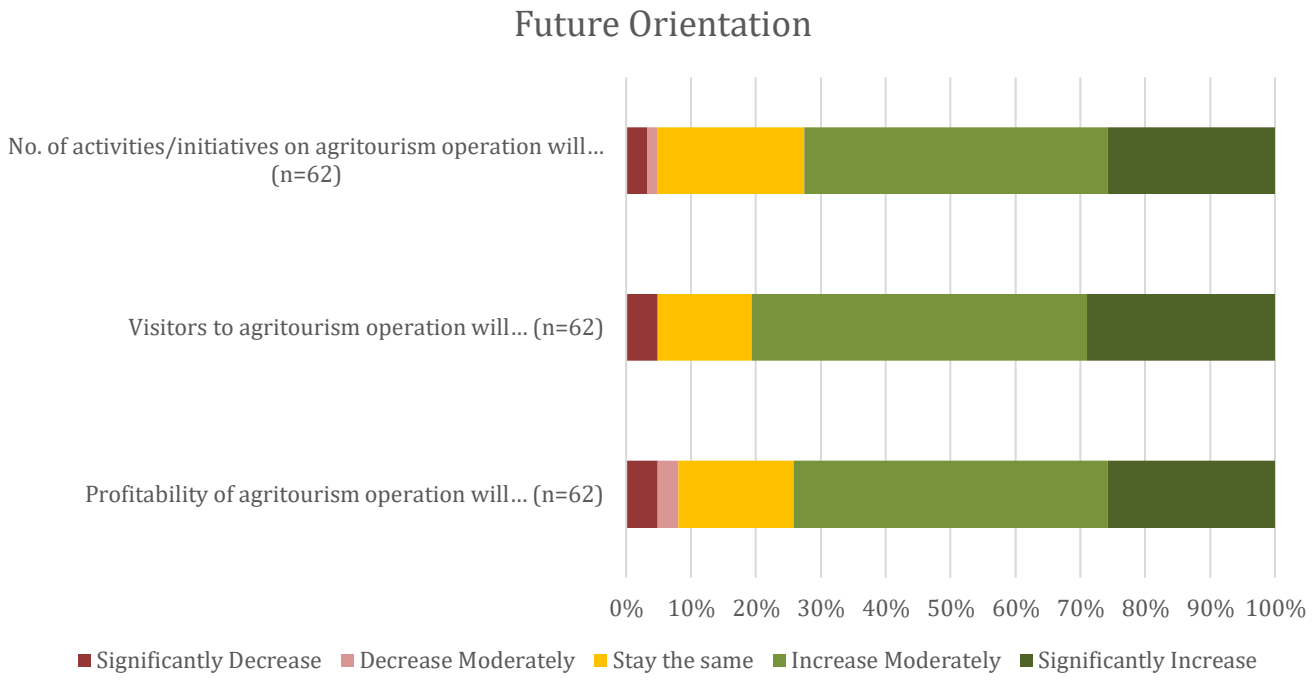

Figure 28. Distribution of respondent ratings of the future orientation of their agritourism enterprises

Conclusion

South Carolina's agritourism sector is diverse, with different regions and types of operations facing unique challenges. There is likely significant variation depending on whether producers are located in tourism-heavy Coastal areas, the Midlands, or the Upstate or more rural, less-visited regions.

Agritourism presents a promising yet underutilized opportunity for South Carolina farms to diversify income streams and strengthen rural economies. The results of the South Carolina producer data subset 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 limited access to financial resources, inadequate infrastructure, and gaps in social cohesion among agritourism operators.

The survey highlights that a substantial proportion of South Carolina farms that offer agritourism activities struggle with profitability, and many lack the necessary financial, marketing, and technical support needed 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:

- **Increase Financial and Marketing Support**: Provide targeted financial aid programs, grants, and low-interest loans to help agritourism entrepreneurs scale their agritourism businesses. Develop accessible marketing resources to assist farms in promoting their offerings to broader audiences.
- **Enhance Regulatory Guidance**: Offer educational workshops and legal consultations for local policy and decision makers, as well as for 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.
- **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. Strategies should be developed to enhance engagement with established networks such as the SC Ag + Art Tour, SC Agritourism Association, and other regional and national organizations, which have demonstrated success in supporting agritourism producers in South Carolina.
- **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

Future research should prioritize examining the specific regulatory challenges encountered in agritourism, rather than assuming broad regional differences. It is also crucial to investigate how zoning laws differ across counties and regions, as opposed to focusing solely on general regulations. Additionally, further inquiry could explore how local governments interpret and enforce state-level agritourism laws.

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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Data underlying this publication was collected under a Study 00016047, determined by the Pennsylvania State University's Office of Research Protections IRB protocol to be Exempt Research. If you have questions or concerns about this research study, contact Dr. Claudia Schmidt at (814) 863-8633 or cschmidt@psu.edu.