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Insights and oversights: Behind the data on agritourism and direct sales in the United States

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Abstract

Agritourism is growing worldwide as farmers and ranchers seek alternative sources of revenue, and consumer demand for agricultural experiences is on the rise. Understanding this sector is important for policymakers, researchers, agricultural service providers, and others seeking to support farm viability and rural entrepreneurship. However, in the U.S., this support is hampered by the lack of a clear definition and consistent, comprehensive means for measuring the agritourism sector. The best available data for the U.S. are from the

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quinquennial U.S. Department of Agriculture National Agricultural Statistics Service (USDA NASS)'s Census of Agriculture. However, the two questions used by the Census of Agriculture that relate to agritourism are worded in ways that limit a comprehensive understanding of the size and scope of the sector. To illustrate the limitations, we highlight cases from two U.S. states (Texas and Vermont), where different forms of agritourism are present. One such form, hunting, is included in the USDA's economic assessments of agritourism; another, pick-your-own berries, is not. Along with tastings and purchases of locally grown products, this falls in the category of *direct sales*. The discrepancy can result in misrepresentation and misinterpretation of the data in analyses and subsequent publications with distorted policy recommendations related to agritourism. We discuss these cases alongside recommendations on how to more accurately measure, and support, agritourism development in the U.S.

Keywords

agritourism, agricultural policy, direct sales, census of agriculture, rural tourism, definitions, U.S. Department of Agriculture

Introduction

Agritourism is a growing part of the global tourism economy. Agritourism connects consumers with local food and culture (Brune et al., 2021), supports rural economic development (Yang, 2012), and provides farmers the opportunity to diversify their seasonal income streams (Khanal & Mishra, 2014; Nickerson et al., 2001). Agritourism encompasses a wide range of activities such as overnight farm stays, dinners on farms, educational tours, and hunting. While there is no consistent nationwide definition for agritourism in the U.S., researchers generally agree that agritourism involves "farming-related activities carried out on a working farm or other agricultural settings for entertainment or education purposes" (Gil Arroyo et al., 2013, p. 45). Agritourism experiences fall into one or more of five overlapping categories: education, hospitality, outdoor recreation, entertainment, and on-farm direct sales (Chase et al., 2018). These five categories of agritourism are widely accepted in the literature and in practice—but they are not used in the Census of Agriculture conducted every five years by the USDA NASS. In this commentary, we discuss the definitions of agritourism and direct sales used in the USDA NASS Census of Agriculture and how they are often inadvertently misrepresented in journal articles and the popular press. We close with a call for a more transparent presentation of the data currently in use and the need for more comprehensive data on agritourism and direct sales so that policymakers, development and planning professionals, researchers, agricultural service providers, and others can better understand and support this important sector for agriculture and community development.

Literature and Policy Review

The breadth of literature and scholarly insight into agritourism has expanded rapidly in recent years. In the last decade, there has been increased demand from consumers for shorter food supply chains and the opportunity to experience local agricultural heritage (Domi & Belletti, 2022). There was also an increase in networks and support for agritourism entrepreneurship (Ammirato & Felicetti, 2013), and more attention paid to agritourism by policymakers who hope to support their constituencies (see AGRITOURISM Act, 2022; National Agricultural Law Center, n.d.).

Agritourism, which was distinguished from rural tourism in early studies (Lane, 1994), has since demonstrated its unique ability to simultaneously contribute to rural communities and support a sustainable agricultural industry. Studies suggest that agritourism and the promotion of local, direct food sales have positive impacts on the social and human capitals of communities (Jablonski et al., 2021; Khazami et al., 2020). While enhancing the appeal of rural tourism destinations (Gao et al., 2014), agritourism also offers economic diversity to communities and producers that otherwise might be less resilient (Brune et al., 2023). Additionally, agritourism and direct sales of farm products have been heralded as a diversification strategy (Barbieri, 2013; Nickerson et al., 2001), increasing farm profitability (Hollas et al., 2021) and the economic viability of rural communities more broadly (Schilling et al., 2012).

Policymakers have used this research to support agritourism in local and regional jurisdictions around the U.S. Even with this significant growth in popularity, the boundaries of agritourism (what is and what is not agritourism) are still unclear. Agritourism experiences are inherently tied to the cultural context of place (Chase et al., in press). Therefore, what might be considered agritourism in the U.S. may not be considered so in another country (Chiodo et al., 2019). The literature contains a growing body of definitions for agritourism that are inconsistent and not always widely accepted. One of the earliest publications (Philip et al., 2010) distinguishes agritourism by concepts such as authenticity and degree of contact with the agricultural activity, and whether it takes place on a working farm. Flanigan et al. (2014) updated this definition empirically, positing that degree of contact (indirect vs. direct) was a key differentiating factor. Others, like Streifeneder (2016), suggest that the context is paramount, differentiating "countryside tourism" from "authentic agritourism." The author insists that "authentic" agritourism is that which takes place on a working farm; any other forms of tourism in rural areas (which do *not* take place on a working farm) should be distinguished as such. "Authenticity" is at the core of practical definitions of agritourism as operators reconsider infrastructure improvements on their property and new production techniques, all while trying to meet consumer demand for the idyllic rural setting (Andéhn & L'Espoir Decosta, 2021; Daugstad & Kirchengast, 2013; Montefrio & Sin, 2021; Palmi & Lezzi, 2020). How conceptions of "authentic" and "inauthentic" agritourism are promoted can have real implications for operators tasked with meeting the demands of both agritourists and their consumers.

In an effort to develop a conceptual framework for agritourism that encompasses the many definitions around the U.S., Chase et al. (2018) identified five overlapping categories of agritourism and noted the relevance and impact of direct sales on the agritourism experience. Several studies have shown that agritourism experiences are a part of building and sustaining consumer demand for local foods (Brune et al., 2021; Che, 2006; Domi & Belletti, 2022). Operational definitions of agritourism typically include direct sales, with pick-your-own operations serving as a frequent example of agritourism in the U.S. However, the U.S. Census of Agriculture separates "agri-tourism and recreational services" from direct sales, which is not always carefully explained in analyses by researchers. Defining agritourism appropriately, with consideration of its true potential impact, is of immense importance as the sector garners more attention from consumers, the press, and policymakers.

Defining Agritourism for Practice

At the core of agritourism are experiences that take place on a working farm or ranch (or other type of agricultural or aquacultural operation) and are deeply connected to production (Chase et al., 2018). For example, visiting an apple orchard to pick your own apples, touring a sugarhouse to learn how maple syrup is made, or having dinner on a farm using products from that farm are considered core agritourism activities. These activities are widely accepted as agritourism throughout the U.S. In contrast, peripheral activities (Chase et al., 2018) may or may not be considered agritourism, depending on the location and context. These are activities that take place on a working farm or ranch but are not deeply connected to agricultural production and are more traditionally associated with tourism experiences and hospitality. For example, gatherings on a farm for a wedding or other event that does not use local farm products and does not include education about agriculture would be considered peripheral. Any touristic activity that does not take place on a working farm or ranch, even if it is connected to agriculture, would also be considered peripheral; examples include farmers markets and agricultural fairs that do not take place on working farms or ranches. In many contexts, these activities are not considered agritourism, but this varies across the U.S.

Defining Agritourism for Policymaking, Regulation, and Support

National definitions and standards for agritourism-related policy do not exist in the U.S. Policies and regulations regarding agritourism are typically enacted at the state, country, or even local levels. As of April 2023, 42 of the 50 U.S. states had agritourism laws in some capacity (National Agricultural Law Center, 2023). Most of these laws can be categorized as civil liability, agriculture, or land use and zoning, resulting in a hodgepodge of regulations that are not consistent. Moreover, there is no one-stop resource to help operators understand how to navigate regulations. Although agritourism operations can be a financially robust part of the local economy, many regulators have limited knowledge about agritourism, causing confusion about what is or what is not agritourism and how regulations affect the farm and the broader community (Hollas et al., 2022).

Although uncertainty does not necessarily prevent entrepreneurship (Ferreira et al., 2022), the variability in definitions, standards, and regulations throughout the U.S. can create difficult operating environments for agritourism enterprises (Hollas et al., 2022). This variability also results in inconsistent data sources and incompatible analyses, which can lead to erroneous conclusions.

Existing Data and Insights

According to the 2022 U.S. Census of Agriculture, 28,617 farms offered "agri-tourism and recreational services" with a total value of over a billion dollars (US$1,259,261,000). Excluded from this are direct sales of farm products to consumers. The value of direct sales in 2022 was US$3,263,074,000 from 116,617 farms. These data are important to practitioners as they seek to build communities of practice and robust systems of support, and to researchers as they examine how agritourism and direct sales impact our economy and rural development more broadly.

In the census questionnaire for farms and ranches, two questions pertain to agritourism:

1. Report the gross dollar amount received before taxes and expenses in 2022 for income from agri-tourism and recreational services, such as farm tours, hayrides, hunting, fishing, etc. (USDA NASS, 2024, p. B-20)
2. During 2022, did this operation produce and sell any crops, livestock, poultry, or agricultural products as food for humans to eat or drink directly to: Consumers (individuals who purchased your products from farmers markets, on-farm stores or farm stands, roadside stands or stores, u-pick, CSA (Community Supported Agriculture), online marketplaces, etc.)? Include processed food products (also known as value-added food products) produced by this operation. Exclude non-edible products such as hay, livestock fed or raised, cut flowers not intended for consumption, Christmas trees, nursery products; commodities produced under production contracts; and products purchased and resold. (USDA NASS, 2024, p. B-43)

The first question is limited to "agri-tourism and recreational services, such as farm tours, hay rides, hunting, fishing, etc." The question is subject to interpretation by survey respondents who may not understand the full breadth and scope of agritourism activities. For example, overnight farm stay hosts may not consider their experiences to be "agri-tourism" and may not include their income in this question, or anywhere on the Census of Agriculture, although overnight stays on farms are core to agritourism in the U.S. and around the world. Direct sales of farm products are expressly excluded from question one above. This means that sales from a pick-your-own operation, or the wine that a visitor buys after a free tour of a vineyard, are not captured as agritourism. These purchases are included under direct sales. Too often, analyses and publications in the U.S. simply look at the "agri-tourism" data from the perspective of the first question and do not include the important component of direct sales of agricultural products.

For example, a frequently cited 2018 paper analyzed patterns in the Census of Agriculture data to understand agritourism enterprise clustering in the U.S. (Van Sandt et al., 2018). This paper attracted considerable attention from the press and was summarized in an article published in the USDA Economic Research Service's *Amber Waves* (Whitt et al., 2019), furthering its reach. This paper and the research that followed used the 2012 Census of Agriculture data, which are based on questions similar to those used in the 2017 and

2022 censuses, to highlight South and West Texas as agritourism hot spots, while regions such as the rural Northeast did not appear on the map. In their analysis, only "agri-tourism and recreation services" revenue is considered. Direct sales to consumers were not included in the analysis, missing a critical part of the picture. However, in publications about the study, the term "agritourism" is used broadly without reference to the specific definitions used in the Census of Agriculture questions. Consequently, some statements in *Amber Waves* may not fully capture the nuanced reality. For instance, the claim that "Agritourism—farms that contain a recreational or educational enterprise component, such as tours of a working farm and pick-your-own fruits—are clustered in west Texas, the intermountain West, and some coastal areas" (Whitt et al., 2019, "Highlights," para. 1) is misleading. West Texas is not a place to find tours of a working farm and pick-your-own fruits. It is a place for fee-hunting, which is part of the Census of Agriculture "agri-tourism" definition, unlike pick-your-own and other experiences where consumers purchase products directly from a farm or ranch.

Examples from Two U.S. States

To expand on how the current data collected on agritourism in the U.S. can be misinterpreted, we provide examples from two contrasting states and their reporting in the Census of Agriculture. A discussion of these cases and their implications follows.

Texas

According to the 2022 U.S. Census of Agriculture, when comparing revenue from direct sales and agritourism in Texas, 37% is derived from direct sales (Figure 1). The remaining 63% is categorized as agritourism revenue.

Texas's large-acreage cattle ranches have been associated previously with high rates of adopting agritourism, with Van Sandt et al. (2019) asserting:

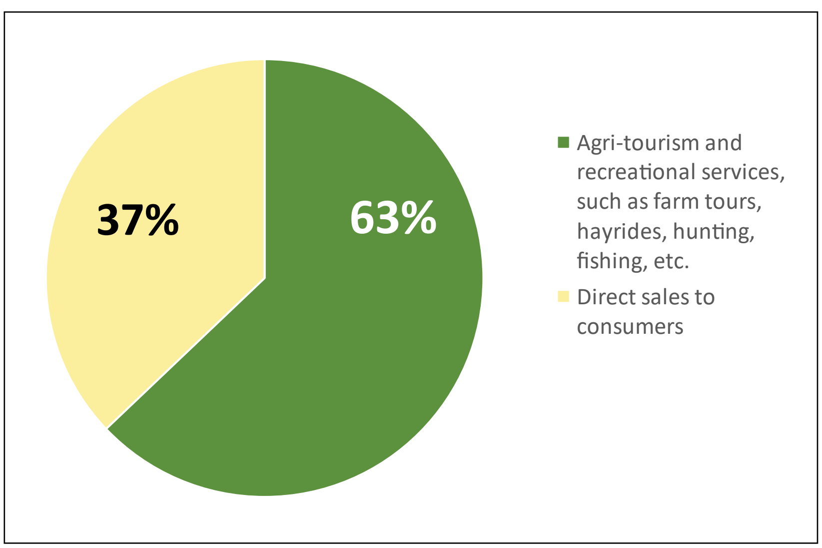
> . . . cattle, for example, has a significant and positive impact on the decision to adopt an agritourism enterprise . . ., suggesting larger livestock operations are more likely to see value in adopting agritourism practices to diversify incomes they generate from their key assets (lands and herds/flocks). (p. 441)

It is true that cattle ranch owners in Texas host a significant number of out-of-town visitors; however, the breadth of their visits is more nuanced than the data suggest.

The photo included in this paper (Figure 2) was taken on a dove hunt in the fall of 2021 in Coleman County, Texas. It depicts the typical experience of an agritourism visitor to the area. Coleman County and surrounding counties in the west Central Texas region are some of the most popular hunting destinations in the U.S. state that consistently grants the most hunting licenses each year (U.S. Fish and Wildlife Service, n.d.).

Coleman County is sparsely populated; with a total population of 7,848, it is ranked 178 out of Texas' 254 counties by population. On a typical hunting day, the hunters meet their guide and are at the hunting location by twilight. The cattle excrement evident in this picture indicates agricultural production on the land; however, the cattle are moved according to the season and, for their

Figure 1. Farm Revenue Sources Related to Agritourism: Texas, 2022

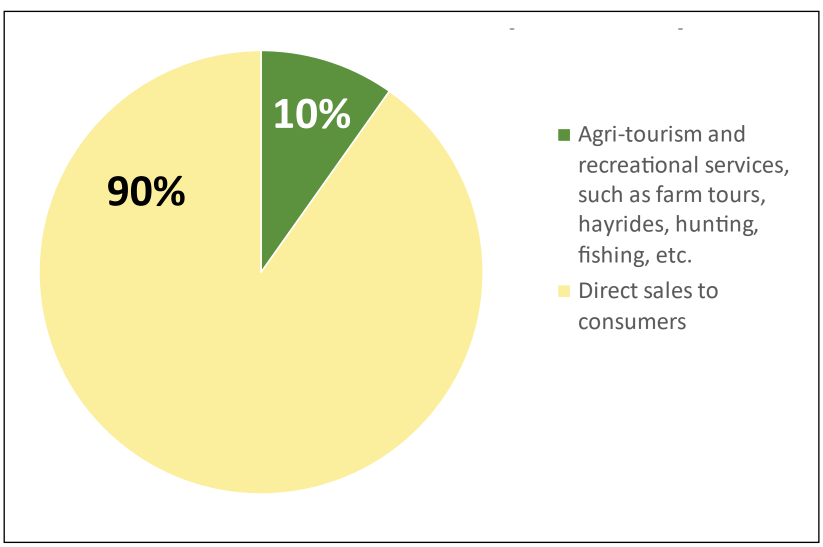


Source: USDA NASS, 2024.

Figure 2. Hunting, a Popular Agritourism Activity in Texas

Photo by author Chadley Hollas.

Figure 3. Farm Revenue Sources Related to Agritourism: Vermont, 2022



Source: USDA NASS, 2024.

protection, are not visible during hunts. The rancher or landowner is not accessible to the hunter, there are no farm tours, nor is there an opportunity to purchase agricultural products. Using previously supported research and the definition of agritourism employed by the U.S. Census of Agriculture, Coleman County and its surrounding region are categorized as an agritourism hot spot (Van Sandt et al., 2018). In the case of Texas, ranchers and landowners might see additional revenue through agritourism activities like hunting, but there are minimal opportunities for tourists to engage with agricultural production and learn about local food culture and agricultural heritage.

Vermont

According to the 2022 U.S. Census of Agriculture, when comparing revenue from direct sales and agritourism in Vermont, 90% is derived from direct sales (Figure 3). The remaining 10% is categorized as agritourism revenue. Unlike West Texas' sprawling ranch lands with a sparse human population, Vermont is characterized by rural villages and small farms that are economically reliant on direct sales of their products to local communities and tourists. Vermont farms reported US$47.7 million in revenue in 2022 for agritourism combined with direct sales of agricultural edible goods (USDA NASS, 2024). This represents 5% of total farm sales in Vermont. In contrast, sales made directly to consumers in the same year represented less than 1 of total farm sales in the U.S. (USDA NASS, 2024). Clearly, agritourism and direct sales are an important part of the agricultural economy and rural landscape in Vermont.

Unlike in West Texas,

Vermont farms provide tours and pick-your-own experiences, neither of which are likely captured by the Census of Agriculture survey. Many wineries, sugarhouses, and creameries offer tours of their vineyards, maple sugaring operations and dairies, respectively; however, they often do not charge for the tour. Rather, they rely on sales of wine, maple syrup, cheese, and ice cream, all of which are captured under *direct sales* by the Census of Agriculture. Vermont's fertile valleys are dotted with pick-your-own operations for strawberries, blueberries, and raspberries in the summer, followed by peaches and apples in the fall. The classic pick-your-own agritourism experience (Figure 4) is captured under direct sales in the Census of Agriculture, not under agritourism. Many other core agritourism experiences, such as farm dinners, tastings, and harvest festivals, are counted under direct sales, as the consumer purchases products from the farm rather than paying a fee that would be counted in the "agri-tourism" question.

This description of agritourism in Vermont is in no way meant to minimize the importance of hunting as an economic driver in West Texas, nor its role as an important cultural activity. However, hunting in West Texas and its implications for community development are very different from the agritourism activities centered around direct sales of locally grown products at small farms in rural communities in Vermont. Understanding this distinction is critical for both research and practice.

Figure 4. U-Pick, a Popular Direct Sales Activity in Vermont

Photo courtesy of Last Resort Farm in Monkton, Vermont.

Revisiting the Data

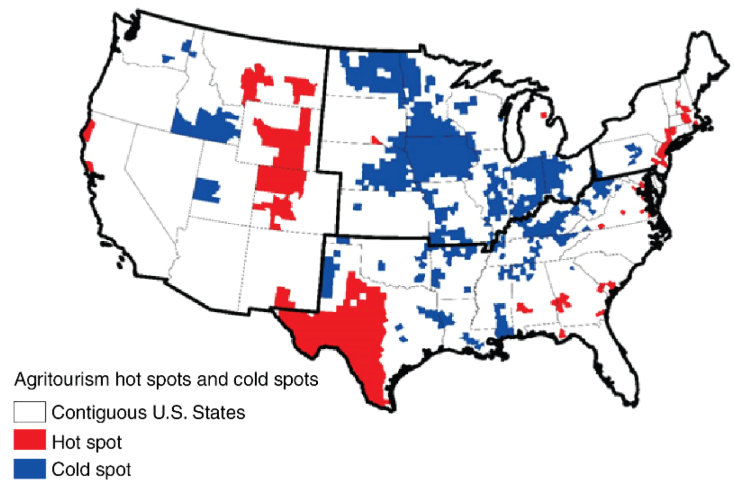
A recent study (Schmidt et al., 2023) has offered new insight into this important topic. The authors of that study consider direct-to-consumer sales in their analysis of agritourism clustering in the U.S. The research highlights the mutualistic relationship between agritourism and direct sales within U.S. counties. The following maps compare an initial clustering of agritourism in the U.S. using 2012 Census of Agriculture data (Van Sandt et al., 2018), with a revised clustering using data from the special request of the 2017 Census of Agriculture data (Schmidt et al., 2023). While the articles themselves include a detailed discussion of the data, Figures 5 and 6 (maps) summarize the importance of having a more complete understanding of agritourism data in the U.S.

When looking at clusters in Figure 5 based only on "agritourism," the two largest hot spots (in red) stretch across the Midwest region, from Montana to Texas. Some small hot spots in the East and West coastal regions are also present. These hot spots indicate that agritourism levels are significantly higher than the national average both within these counties and in their neighboring counties.

However, when considering clusters based both on agritourism and direct sales (Figure 6), the hot spots shift. Especially when looking at agritourism in one county and direct sales in its neighboring counties (Figure 6, top map), the Northeast region stands out as the largest hot spot, along with some coastal counties in the West. These hot spots represent higher-than-average agritourism activities in one county and higher-than-average

Figure 5. U.S. Agritourism Hotspots According to Van Sandt et al. (2018)

The intermountain West and Texas had large agritourism hot spots in 2012, while cold spots were concentrated in the Midwest



Note: "Hot spots" show high concentrations of farms and ranches with agritourism revenue. "Cold spots" show low concentrations of farms with agritourism revenue. Hot spots and cold spots are determined using local indicators of spatial association, which are statistics that evaluate the existence of clusters. Hot spots are clusters with higher rates than expected by chance alone (rho < 0.01), and cold spots are clusters with lower rates than expected by chance alone. Data do not include Alaska and Hawaii.
Source: USDA, Economic Research Service using data from USDA, National Agricultural Statistics Service, 2012 Census of Agriculture.

Source: Figure reproduced from Van Sandt et al., 2018 and used under CC 4.0.

direct sales in its neighboring counties. Conversely, when looking at direct sales in one county and agritourism in its neighboring counties (Figure 6, bottom map), we observe a smaller number of counties being identified as hotspots, including a relatively large one around the Hudson Valley, New York. In addition, counties in West and South Texas move from the High-Low category in the upper map above to the Low-High category in the lower map, indicating that although these counties have higher-than-average "agritourism" activities, their direct sales are below average.

The Schmidt et al. (2023) analysis presents a clearer picture of what "agritourism" looks like in various regions in the U.S. and emphasizes the importance of direct sales to agritourism.[1] In particular, the study shows that while agritourism and direct sales can complement one another within individual counties–higher levels of one activity are associated with higher levels of the other, relative to the national average and to neighboring counties–they also can complement or reinforce one another across county borders. Thus, it is important not only to consider direct sales to consumers as an agritourism-enhancing activity within a county, but also across counties in a region.

Conclusions and Recommendations

As the cases above illustrate, when researchers study agritourism and use the USDA NASS Census of Agriculture definition for "agri-tourism and recreational services," which excludes direct sales, the true impacts of agritourism on rural communities and agricultural producers alike may be misrepresented and misunderstood. More resources are needed to support research on the complexities of these social and economic phenomena, particularly the role of agritourism as a tool for rural development and ensuring the viability of small farms. These resources could come from federal, state, local, and private sources. Until data are collected in a manner that appropriately reports agritourism revenue combined with on-farm direct sales, researchers, policymakers, and community planners should be mindful of the conclusions drawn from the data currently available.

As the example comparing Texas and Vermont discussed above illustrates, previous analyses (e.g., Van Sandt et al., 2018) can result in misunderstandings. For example, regulators and community lead-

[1] The clusters jointly determined by agritourism and direct sales are the outcome of the bivariate Moran's I statistic. Such statistic measures the correlation of one variable, e.g. agritourism, in one county and the average of another variable, e.g. direct sales, in the neighboring counties. The simple correlation between agritourism and direct sales in the same counties is statistically significant in the Schmidt et al. (2023) analysis.

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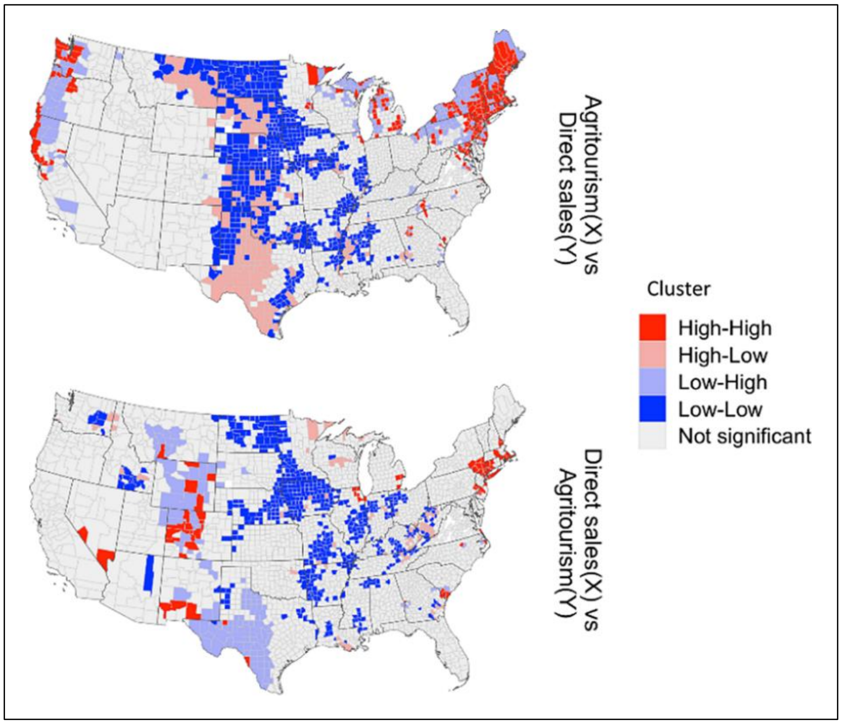
Figure 6. U.S. Agritourism Hotspots According to Schmidt et al. (2023)



Source: Figure reproduced from Schmidt et al., 2023 and used under CC 4.0.

ers in Vermont could vastly underestimate the high proportion of small producers offering agritourism and make legislative decisions that do not support this important segment of Vermont's agricultural economy. Similarly, misled by this information, destination marketers in Coleman County, Texas, might promote the many opportunities for tourists to connect with producers for agricultural experiences and purchasing of local products. However, these opportunities rarely exist in Coleman County, as ranchers and their cattle keep a safe distance from hunters, for good reason. Fee-hunting provides a different type of community development opportunity than pick-your-own berries, dinners on the farm, overnight farm stays, and wine tourism. This distinction is lost in previous analyses that do not clearly identify the specifications and limits of the data used. Comprehensive, detailed data on the scope and scale of agritourism, including direct sales, is urgently needed. To aid in comprehensive data collection, a widely accepted definition of agritourism in the U.S. would help ensure consistency in analyses and the development of policies that are truly supportive of agricultural entrepreneurs in rural areas.

As the sector grows and calls for more resources for operators continue to escalate, comprehensive data on agritourism throughout the U.S.—encompassing the five overlapping categories of education, direct sales, hospitality, recreation, and entertainment—and distinguishing between on- and off-farm experiences—is urgently needed. Targeted educational programs for agritourism operators, adapted to their needs and unique business models, are crucial if agritourism is to reach its potential for helping to sustain rural life and livelihood. For researchers, agricultural service providers, policymakers, producers, and others alike, it is critical to understand the types of agritourism offered and their economic, environmental, and social impacts. That is not currently possible with the U.S. Census of Agriculture data, which remain the best source of data available.

We look to federal, state, and local sources as well as nonprofits and networks within the agritourism sector to assist with a strategy for data collection and management over the long term. These data are critical for addressing a multitude of questions related to the economic viability, environmental sustainability, and social impacts of agritourism on agriculture and rural communities. In closing, we emphasize the need for detailed, comprehensive data regarding agritourism and direct sales that includes information about the specific types of experiences and product sales taking place on agricultural and aquacultural operations, along with a consistent, widely accepted definition of agritourism in the U.S. Until that day comes, we caution researchers, policymakers, and others using U.S. Census of Agriculture data to be clear about what is—and what is not—included in the variables used for analysis and the resulting policy implications.

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