Chapter 22

Agri-tourism and Rural Outdoor Recreation in the US: A Framework for Understanding Economic and Employment Dynamics*

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Agri-tourism and rural outdoor recreation are positioned at an important intersection between agricultural, natural resource, economic development and rural issues. This chapter summarizes some of the important dynamics of these sectors, including the role of land use, regional drivers, motivations for farmers and travelers, and economic impacts. As a means to illustrate several key points, highlights of several

*The views expressed here are those of the authors and may not be attributed to the University of Missouri, US Geological Survey, or Colorado State University.
case studies, papers and reports about rural outdoor and agricultural tourism are summarized. To conclude, a research agenda for those interested in the role of tourism to rural economies is framed.

22.1 Introduction

Agri-tourism, commonly defined as “farming-related activities carried out on a working farm or other agricultural settings for entertainment or education purposes” [Arroyo et al., 2013], is a relatively new area of discovery for rural policy, economic development and employment. However, the boundaries and characteristics of agri-tourism are ill-defined, leading one study to develop a conceptual framework that incorporates five categories of activities including direct sales, education, hospitality, outdoor recreation and entertainment [Chase et al., 2018]. It suggested that it may also be useful to include peripheral tiers, including other community-based food, agriculture and natural resource-based activities. For this reason, agri-tourism and rural outdoor recreation are worth considering jointly as they both leverage the natural assets (land, natural resources), human capital (skills, family members) and cultural heritage of rural places. Moreover, there is evidence both subsectors are important economic drivers for rural areas. In the US, agri-tourism and outdoor recreation have connections to larger rural policy issues including land use and conservation, emerging public interest in reconnecting with their food system, and leveraging the diverse heritage and histories of rural communities across America to create entrepreneurial and economic opportunities.

While the growth and success of agri-tourism varies across regions and farm/ranch types, the number of agri-tourism farms and ranches in the contiguous US grew by roughly 64% between 2002 and 2012 according to the 2012 USDA Census of Agriculture, the most recent available data (USDA collects such data only for activities directly occurring on the farm). In 2012, 33,161 farms reported $704 million in revenues from agri-tourism and recreational services; however, the total percentage of farms and ranches with agri-tourism in the US is still relatively low at 1.6%, and accounts for only 0.2% of gross farm revenues. It is important to recognize, however, that agri-tourism revenues collected by farms are just the
start: economic inflows to surrounding communities may be significantly more when one considers visitors’ spending on lodging, dining, retail, and additional recreational enterprises while visiting the area — increasing the economic impact of agri-tourism to a host community.

Given the size, growth and potential linkages to rural development, this chapter will provide context for agri-tourism’s role in linking a wide array of public issues to economic development in the rural US. First, we examine the supply-side factors associated with US agri-tourism, including regional assets most associated with agri-tourism. We then discuss factors associated with visitor demand for agri-tourism. Finally, we examine the nexus between agri-tourism and the rural economy; its spillovers, relevant policies, and impacts.

22.2 The Potential Supply of Agri-tourism in the US

22.2.1 Patterns of landownership and outdoor recreation in rural America

The settlement of the US territory in North America was often motivated by the prospect of owning land. Today, rural land ownership in the US is a mixture of public and private lands. Such a mix creates a complex narrative for the rural outdoor recreation and tourism sector that may host activities on private, local, state or federal lands. The US federal government owns 640 million acres of land, about 28% of the nation’s total land area [Vincent et al., 2017]. Federal land ownership varies drastically between the East and West regions of the US: the majority of federal lands are located in the West (Figure 22.1). Specifically, federal land ownership as a proportion of land ownership in the US varies from less than 1% for several states in the East to almost 85% of the land area in the Western state of Nevada.

The supply of outdoor recreation opportunities mirrors Federal land ownership, with a large portion of recreation opportunities occurring on publicly owned Western lands. Figure 22.2 shows the distribution of publicly owned (including federal, state and locally owned) outdoor recreation lands (Figure 21.2(a)) and privately owned outdoor recreation lands (Figure 21.2(b)).
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Fig. 22.1. Federal land as a percentage of total state land area (map courtesy of the Bill Lane Center for the American West, Stanford University).

Fig. 22.2. Public (a) and private (b) outdoor recreation as a share of total county area. 

Note: See text for variable definitions.
Public outdoor recreation lands are defined as any land that is owned by a government entity and open to the public for recreational use, while private outdoor recreation land is similarly defined with private land ownership. The variables were created using the 2010 Protected Areas Database of the United States (PADUS) geodatabase which represents public land ownership and conservation lands, including voluntarily provided privately protected areas.

Although a large portion of recreation lands occurs in the West, counties with recreation-dependent economies are distributed across the nation (Figure 22.3).

The US Department of Agriculture (USDA) Economic Research Service (ERS) classifies 333 counties in 43 US States as recreational. These recreation counties are determined by a weighted index of (1) jobs; (2) earnings in entertainment, recreation, accommodations, eating/drinking places and real estate; and (3) the share of vacant housing units intended for seasonal/occasional use. Counties with a score more than one standard deviation above the mean are defined as recreational.
22.2.2 Agri-tourism and the rural economy

Rural economies have substantial economic development challenges. Many rural areas of the US are losing population (Figure 22.4), which presents challenges for rural leaders seeking to maintain the people and tax base necessary to support key public services (health care, education, cultural programs). Population loss also generates challenges for local businesses, whose markets diminish unless other (urban or otherwise non-local) consumers can be attracted.

Due to relatively high rates of economic growth, rural recreation counties are often presented as rural success stories. Indeed, research suggests that recreation and tourism can help diversify the local economy. A diverse rural economy is less vulnerable to the boom and bust cycles of natural resource extraction and traditional farming enterprises, and recreation and tourism activities can provide additional income to farm households [Reeder and Brown, 2005]. Rural well-being varies

Fig. 22.4.  Non-metro population loss widespread in all Eastern States, 2010–2014.
across space, often with the natural assets or industrial composition of a region. Specifically, rural areas with recreation-based economies tended to outperform other rural areas in several measures including median household income and poverty rates (Figure 22.5), and educational attainment, population growth and increased health outcomes [Reeder and Brown, 2005].

### 22.2.3 Location and operational factors associated with farms participating in Agri-tourism

Demand for outdoor recreation is increasing, but government-provided outdoor recreation opportunities are remaining constant, creating a gap between government supply and the demand from the public. This gap in outdoor recreation supply is increasingly being filled by private landowners who create opportunities for public outdoor recreation on their land as they see opportunities to attract visitors [Goldbach, 2012].

As with outdoor recreation in general, there are complex community and enterprise-specific regional and spatial patterns in agri-tourism provision across the US. Van Sandt et al. [2018] find that travel infrastructure, region and rurality, characteristics of the local economy and proximity to outdoor attractions are all significantly associated with agri-tourism provision.

The diversity of farm, cultural, and community assets make it important to understand the differences in tourism strategies that may be best suited to development of the recreational sector. Larger farms and ranches that produce specialty livestock, horses, and grapes/wine tend to generate more agri-tourism revenue than smaller farms. It is also more common to have larger operations offering experience-based agri-tourism activities such as organized events, entertainment and outdoor recreational activities [Van Sandt et al., 2018]. Grapes, and associated wine production, represents one of the largest drivers of higher agri-tourism economic activity, likely reflecting the longstanding popularity of wine-based agri-tourism. Smaller farms and ranches (grossing under $350,000 per year) tend to attract more agri-tourism business through fruit and nut production, perhaps offered through U-pick operations or sales at farm stands offering unprocessed or value-added products.
Fig. 22.5. Rural recreation counties fare better than many other rural counties in median household income (a) and poverty rates (b).

Note: Medians show that half of those who live in a type of county are in a county with a lower median household income, and the other half are in a county with a higher median household income. Values are in constant 2015 dollars deflated by the Consumer Price Index.

In general, Van Sandt et al. [2018] conclude that agritourists are drawn toward experiences with unique types of agricultural production, especially those that are more conducive to human interactions (e.g. horses and fruit vs. sheep or bees). In addition, agritourists tend to place higher values on agri-tourism activities that take advantage of the region’s history, culture, or natural assets. For example, agritourists place higher values on horseback-riding activities in the West, compared to those in the Midwest, most likely due to the region’s rich cowboy culture and many scenic areas under both private and public land management [Hill et al., 2017].

22.2.4 The motivation to pursue agri-tourism on-farm

Many studies have reviewed the motivations driving individual farm and ranch operators to offer agri-tourism or recreation opportunities. While many have suggested employment, particularly of family members, as a motivation, recent research suggests that other factors, such as connecting to customers and enhancing quality of life, may be more important drivers.

The motivations to pursue agri-tourism likely vary by operation and are complex. Barbieri [2008] found that US agri-tourism business owners, when compared to non-agri-tourism farm businesses, were more likely to be driven by firm profitability, report agriculture as their primary occupation and have adult children living at home. Based on these factors, the author suggests that agri-tourism may be creating on-farm/ranch employment for family members. In a study of Canadian agri-tourism businesses, Barbieri [2010] examined 19 goals related to agri-tourism development in Canada and found a complex set of market-based and non-market-based goals (such as continuing to farm and enhancing quality of life) were ranked highest, while generating employment for family members was ranked lowest among a subset of family-related goals.

McGehee [2007] points out that motivations may change as the business evolves and ages, and finds that agri-tourism job creation may have a limited impact at the farm level, averaging four part-time employees for each agri-tourism enterprise. McGehee and Kim [2004] looked at a continuum of motivations and outcomes for agri-tourism entrepreneurs and
their businesses, finding that generating additional income was ranked higher by respondents than creating jobs for family members. Similarly, a 2015 study of Colorado agri-tourism business owners reported that creating jobs for family members was ranked lowest of all desired outcomes, while connecting the farm/ranch to its customers (of agricultural product enterprises) was ranked the highest [Hill et al., 2017; Van Sandt and Thilmany, 2016].

Perhaps these motivations could also be considered in the context of the size of farm and community. From other research reported here, small farms near urban areas seem less concerned about job creation, and instead focus on building a loyal customer base to capture the food dollars of nearby residents. And, in contrast, larger operations may view agri-tourism as a means to diversify their income stream. But still, given their seasonal agricultural labor needs and fewer alternative employment options during off-season in their surrounding rural communities, it may help to fully utilize workers they already employ in peak season, and even if they're just able to hire a handful of workers, for small towns, that may be a relatively important impact.

22.3 Exploring Varying Demand for Agri-tourism Across the US

Given the diverse set of agri-tourism opportunities in the US, it is no surprise that demand for agri-tourism varies with visitor demographics and traveler type. As a whole, US agritourists do not look different from the rest of the population. According to a 2014 survey of 1,000 agritourists who had participated in agri-tourism in the Western US, agritourists differ from the general population in that they are slightly more likely to be female (55%), be from slightly higher-earning households (median household income: $62,500), and are generally younger (median age: 34) than the US population [Hill et al., 2017].

Farms and ranches proximate to metro areas are able to take advantage of demand from nearby visitors. As with most travel, US agritourists prefer destinations closer to their residence. So, even though agri-tourism farms and ranches that are relatively small (with less than $350,000 in sales) generally report less revenues, those near population centers
capture relatively higher agri-tourism revenue than their peers. In contrast, larger-scale farms and ranches benefit from the demand created by “a getaway effect,” a term Van Sandt et al. [2018] termed for being remote from major travel corridors and high-density urban areas. As such, larger operations offering experiences and access to uncongested natural resources appear successful at drawing tourists to more rural locations and collecting a greater level of revenues from such long-term visits [Van Sandt et al., 2018].

The decision to participate in agri-tourism seems evenly distributed across the population, yet the types of agri-tourism that draw such visitors does vary, not only across consumers with varying demographic characteristics, but also across traveler types. A recent survey of agritourists found that agri-tourism destinations are often a primary draw, with 72% of respondents listing their visit to an agri-tourism site as the primary purpose for their trip [Hill et al., 2017]. For the other 28% of respondents, agri-tourism represented a complementary excursion from their main trip. A significant portion of these secondary agri-tourism visitors (19%) listed a state or national park, beach, or forest as their primary destination, suggesting that proximity to outdoor recreation destinations may provide opportunities for agri-tourism. Van Sandt et al. [2018] also find evidence of a higher share of farms report revenues from offering when they are located along scenic byways. That finding, together with travelers reporting numerous multi-destination trips, may signal that there is potential to attract more visitors to consider stopping at an agri-tourism site as a pit stop while on road trips through these scenic byways.

Knowing that travelers bundle multiple destinations/activities within a single trip to maximize their experiences (and utility) relative to their travel costs, we can surmise that the surrounding community and locational characteristics play important roles in travelers’ demand for agri-tourism experiences. Van Sandt et al. [2018] find that agri-tourism sites earn more revenue when they are surrounded by a cluster of other agri-tourism sites, so competitive forces appear to be outweighed by the agglomeration benefits of a variety of attractions to draw visitors to an area. In short, cooperation among recreational providers should trump concerns about competition.
Beyond the idea that visitors are attracted by the choice of multiple activities within a small travel radius, on the supply side, agri-tourism firms may simply benefit from efficiency gains from joint promotion, programming and information-sharing. One example of coordination of joint promotion and programming is illustrated in an agri-tourism case study of Butte County, California [Hill et al., 2017]. Butte County is a 90-minute drive from the nearest large metro area — a challenge for those potential urban visitors who find that drive to be too far for a weekend. To strengthen and promote agri-tourism as a regional visitor draw, a network of county, municipal, tourism industry and hospitality industry agencies are working with local agri-tourism operators to develop coordinated plans.

22.4 Economic Impacts of Agri-tourism

In order to consider the broader benefits of agri-tourism to communities and regional economies, researchers commonly frame and estimate economic impacts in a variety of ways [Bauman and Thilmany, 2017]. Given the differences in the operational models and nature of visitors (locals vs. out-of-area visitors) for agri-tourism, careful consideration must be taken when modeling economic impacts. The direct effects (monies brought into the community, particularly by non-local visitors) may have positive income-diversification and cash-flow implications for farm operators. But also, there is interest in how those additional revenues may circulate through the economy as the farm owner or its employees spend their earnings, creating indirect effects. Whether benefits accrue to farms directly or to their broader community, it is important to understand as broader economic spillovers may help to bolster community support for operations attracting visitors to the area.

The nature of agri-tourism, in part, makes measuring the distribution and type of employment created difficult — both on-farm and in the wider community. For example, agri-tourism itself is broadly defined — from on-farm sales, to children’s camps, to hunting and much more. In addition, the labor needs of each enterprise type are different. High-visitiation, customer-service-oriented agri-tourism requires a lot more staff on-site than does a farm store. Furthermore, the spillover and competition effects
of agri-tourism on the community will depend on the presence of community-based assets (i.e. natural amenities), infrastructure to support visitation (i.e. lodging, restaurants, other retail stores), as well as other activities that compete with agri-tourism for visitor dollars.

Several studies have estimated employment creation related to agri-tourism at a local, regional or state level. A 1998 study of a single agri-tourism operation in populous San Diego County found that the operation generated 69 full- and part-time jobs in the city of Carlsbad alone [Lobo et al., 1999], and that for every $1 million spent by visitors in Carlsbad, 33 jobs in the retail food sector and 37 jobs in the recreation sector were created. A 2005 economic impact study for Maine found that agri-tourism in the state supported a total of 1,762 full- and part-time jobs, including 39% of all hired farm workers; indirect employment was estimated at 165 part- and full-time jobs in other sectors [Allen et al., 2006]. Thilmany et al. [2007] used visitor data from the Colorado Tourism Office and a 2006 traveler expenditure survey to model the economic contributions of agri-tourism. The study found that agri-tourism generated an estimated 14,665 direct and indirect jobs in the Colorado economy, equivalent to 7% of all the state’s jobs in tourism. These jobs depended primarily on out-of-state visitor expenditures (80% of agri-tourism’s impact in Colorado was attributed to out-of-state travelers).

In the Delta Byway region of Arkansas, a primarily agricultural area, researchers estimated a baseline economic impact of agri-tourism using visitor and expenditure data from the Arkansas Parks and Tourism Department [Das and Rainey, 2008]. Based on several agri-tourism growth scenarios, the study predicted that growth in employment would occur primarily in low-paying hourly jobs in the retail sector (e.g. hunting supply retail), followed by accommodations and food service. Overall, the study found that the greatest employment impacts were within non-agricultural businesses in the Delta Byway communities, such as retail, lodging and food services businesses. Marcouiller [2007] stresses that while tourism jobs are often entry-level, the industry itself may create incentives for entrepreneurial endeavors; indeed, rural areas in the United States have a higher proportion of both farm and non-farm proprietor employment [Bureau of Economic Analysis, 2017]. So, beyond employment gains, some of the positive economic benefits from tourism may be
masked if the services and goods on which travelers spend money are provided by non-employer entrepreneurs who open for business if they perceive unmet demand from out-of-area visitors.

22.4.1 Federal lands and policy affect the economic impacts of outdoor recreation and agri-tourism

Land available for outdoor recreation, whether publicly or privately owned, provides natural areas and open spaces, which numerous studies have found to have significant economic values [McConnell and Walls, 2005; Bolitzer and Netusil, 2000; Shultz and King, 2001; Riddel, 2001], and connections with rural employment growth [McGranahan et al., 2010]. Marcouiller and Hoogasian [2014] explore the specific role that recreation on public lands plays in rural development, noting that public lands — federal, state, and local — contribute to an area’s natural amenities, which have been linked to more robust economic development [McGranahan, 1999].

Recent research shows that rural counties with a higher proportion of federal lands have faster population, income and employment growth than counties with less federal land [Kovacs et al., 2017; Rasker et al., 2013; McGranahan, 2008; Thompson et al., 2006; Shumway and Otterstrom, 2001]. Goldbach [2012] found that the provision of new private outdoor recreation may be coupled with existing public outdoor recreation. Federally designated National Parks are an important driver of nearby agri-tourism ventures. Tourism spillovers provided by proximity to national parks are important to the many rural communities serving as gateways to national parks, forests, and seashores. According to 2017 data from the National Park Service, 331 million people visited US national parks and spent an estimated $18.2 billion in gateway regions across the US. Visitor spending in gateway communities include accommodations, food and retail expenditures, along with spending in recreational industries, which may include agri-tourism spending. A breakdown of this spending can be seen in Figure 22.6 [Cullinane Thomas et al., 2018].

Research offers clear evidence of the positive impacts of national parks and monuments to their surrounding communities. One such study looked at the economies surrounding the 17 national monuments that were
created between the years of 1982 and 2001. In each instance, they found that the local economies surrounding the monument expanded following the creation of the new monument [Headwaters Economics, 2017]. Another study found that for each 100,000 acres of wilderness, National Park or National Monument in a county, the per capita income of their residents increased by $4,360 [Rasker et al., 2013].

Marcouiller and Hoogasian [2014] describe several important federal programs that promote outdoor recreation as a rural development tool. Some of these programs seek to increase participation in outdoor recreation generally (e.g. the National Park Service’s Outdoor Nation and the Bureau of Land Management’s Wilderness Inquiry). Other programs stimulate the growth and use of both private and non-federal supply of recreation lands by facilitating infrastructure and training (e.g. the Community Forest and Open Space Program (US Forest Service) and the Land and Water Conservation Fund (National Park Service)). Other policies encourage or facilitate recreation on private lands. For example, the Natural Resources Conservation Service (NRCS) provides incentives to landowners to allow temporary access for recreation on farmland through the Voluntary Public Access and Habitat Incentive Program. Similarly, the US Forest Service’s Forest Legacy Program provides funding to preserve private forest lands that can be used for recreation.
Another federal policy affecting recreation on private lands is the Conservation Reserve Program (CRP). Administered by the USDA NRCS, CRP pays farmers to remove environmentally sensitive land from agricultural production in order to reestablish native plant species, improve water quality, prevent soil erosion, and reduce the loss of wildlife habitat. Some private land owners permit hunting on CRP (see Box 22.1).

**Box 22.1: An example of the economic impacts of the Conservation Reserve Program on agri-tourism**

Loomis *et al.* [2015] surveyed deer, waterfowl, and upland game bird hunters in North and South Dakota to estimate the proportion of hunting that takes place on private land enrolled in the Conservation Reserve Program (CRP). Survey results were used to estimate the economic impact that CRP land used by out-of-state hunters had on the two states’ economies. Results showed the relative importance of CRP land to hunting-tourism.

Over half of upland game bird hunting took place on CRP land, 42% of deer hunting in North Dakota and 23% in South Dakota took place on CRP lands, and 23% of waterfowl hunters in North Dakota, and 21% in South Dakota used CRP lands (Table 1). This agri-tourism activity generated over 1,000 jobs and millions in economic impact in these two states. In addition to the expenditures from out-of-state hunters, in-state resident hunting on CRP lands also generated spending in rural areas amounting to an additional contribution of $42 million in the two states.

Table 1. Economic impacts and jobs from hunting on conservation reserve lands in North Dakota and South Dakota.

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*Source: Loomis *et al.* [2015].
22.5 Informing a Future Research Agenda on Agri-tourism and Rural Economies

Despite its potential as a farm diversification and rural development tool, agri-tourism is not a magic bullet. However, recent growth in the broader tourism sector, the number of farms reporting recreational enterprises, and the longstanding goal of the US to strengthen rural economies, all lead one to believe that agri-tourism is worthy of future study. The diversity of interests that travelers revealed in past research indicates that farms of all scales and geographic locations have opportunities to attract visitors. The businesses that are most likely to benefit from agri-tourism are those that can jointly offer and promote traveler experiences that are customized to the traveler base already coming to their area (particularly for small operations without the resources to promote and recruit travelers themselves). But, in the case of sizable operations with large landholdings, they may be better positioned to integrate their natural capital and leverage the draw of other outdoor recreation assets in their regions. Since there is already research focused on agri-tourism and its travelers, and parallel work on national parks and public lands, perhaps it is time to consider whether further integrating such research projects could result in richer findings.

Inherent in this call for more integrated research is the longstanding issue of how to measure the economic contribution of tourism and outdoor recreation in an economy. There are several government classifications and sectors that are commonly used to measure the travel sector (lodging and segments of retail, transportation and recreation), but there is not currently a formally structured industrial code for tourism or for outdoor recreation. The US Bureau of Economic Analysis (BEA) produces a travel and tourism satellite account that measures the contribution of travel and tourism-related economic activity to the US gross domestic product; and the BEA is currently prototyping an outdoor recreation satellite account to measure the size of the outdoor recreation economy (which includes agri-tourism activities among a broad range of outdoor recreation activities) [Highfill et al., 2018]. These satellite accounts provide economy-wide estimates of economic activity, and therefore their primary usefulness is in helping to understand nationwide trends and patterns. Given the small and fragmented nature of agri-tourism and rural recreation [Chase et al., 2018], data and tools that would enable finer geographic measures of the
tourism and outdoor recreation industries would facilitate future research on agri-tourism’s economic development implications.

The economic opportunities associated with agri-tourism include both on-farm jobs and income, as well as increased business activities in support sectors, such as lodging, retail and food services. Economic contributions flowing from these opportunities may increase farm income and may provide new employment or entrepreneurial opportunities in rural areas; however, many new jobs may be in lower-paying hospitality and retail services sectors. We conclude that, although understanding the economic contributions of the recreation and tourism sectors to the economy is important, it is even more important to understand who benefits and to what degree.

Finally, to fully translate this research to farm stakeholders, there should be more information on how local and state policies and programming also align with their operational goals. In order to successfully assess and navigate the development of more agri-tourism and outdoor recreation, technical assistance providers and local governments should make the policy environment for such enterprises transparent. Both Colorado State University and Rutgers University have developed materials to guide producers in their states and regions (http://agri-tourism.rutgers.edu/training, https://agri-tourism.localfoodeconomics.com, both accessed 9 October 2018). As another example, the American Planning Association has recognized that need, and has compiled a collection of useful articles (https://www.planning.org/knowledgebase/agri-tourism/, accessed 9 October 2018). Continued efforts to provide such guidance, and if possible, harmonization on various issues such as zoning, on-farm lodging (e.g. AirBnB) and hiring contractors to guide outdoor experiences, would lessen perceived barriers to potential agri-tourism and outdoor recreation operators.

References


