



Agritourism in Pennsylvania:

An Industry Assessment



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Project Summary

Winery tours, corn mazes, farm-stay vacations. These are just some of the agritourism activities that more and more tourists are enjoying during their vacations in Pennsylvania.

Agritourism, which includes most any activity conducted on a working farm for the enjoyment of visitors that generates income for the owner, is growing nationwide and in Pennsylvania. Its potential to generate benefits, and costs, for the state and its rural areas, however, remains unclear.

To learn more about the opportunities and consequences of this growing industry for Pennsylvania’s rural areas and the tourism and agricultural industries, researchers from California University of Pennsylvania conducted a study that looked at the agritourism industry in the state in 2004. The researchers surveyed agritourism operators, farmers and agritourists to understand the types of activities being offered and enjoyed, and they identified policy considerations on how the industry may benefit from various policies, programs and funding.

Overall, the researchers suggest that:

- A statewide infrastructure be developed to provide agritourism education and training for farmers, tourism professionals, civic leaders, and all present and potential stakeholders.
- An expanded definition of agritourism be adopted to address use of land issues.
- A more comprehensive effort be made to market the state’s agritourism and rural tourism opportunities.
- The state consider initiating an “agritourism development fund,” which would synthesize funding application requirements for the agriculture and tourism categories of the state’s First Industries Fund.
- The state account for agritourism, specifically, in its tourism data gathering activities.

Introduction

Agritourism presents a rising opportunity for the tourism and agricultural industries in Pennsylvania. In spite of this industry's growth nationwide, it remains poorly understood. The few studies on agritourism are outdated, and most were conducted in Europe or Canada (Polovitz et al., 2001). Oppermann contends that research on agritourism has focused mostly on bed and breakfasts and lacks a comprehensive body of knowledge (1995). This is especially true for agritourism in Pennsylvania.

While agriculture and tourism are leading industries in Pennsylvania (Pennsylvania Farm Bureau, 2005; and Pennsylvania Media Center, 2003), state government is just beginning to forge the relationship between the two. And while the state Department of Community and Economic Development (DCED) compiles the state's visitor statistics, its visitors' survey does not include all agritourism activities. Likewise, the Pennsylvania Agricultural Statistics Service (PASS) does not consider all agritourism activities as agricultural economic activities.

Agritourism may present benefits and costs to Pennsylvania's rural areas. From the perspective of agricultural operators, agritourism may provide a means to expand existing operations, diversify or supplement income, or acquire new skills. From the perspective of Pennsylvania's rural communities, agritourism may be a vehicle to land preservation, local revitalization, and job creation.

Agritourism may also increase costs to rural communities in the form of excessive demands on rural regions, increased costs of living for local people, and environmental damage to rural landscapes.

Since neither DCED nor PASS formally tracks and evaluates agritourism's characteristics and its impacts on the commonwealth, the researchers undertook this study to generate necessary primary data that may help to shape public policy.

For the study, the researchers surveyed key stakeholder groups, which included agritourism operators, agricultural operators (farmers), state Tourism Promotion Agencies/Convention and Visitors' Bureaus (TPAs/CVBs), other agritourism product stakeholders (industry and organization representatives), and agritourists.

The project was initiated by the following key research questions:

- What is agritourism?
- Who is doing it?
- What are the characteristics of agritourism businesses?
- Who are agritourists?
- What is and is not working for agritourism businesses?
- What are the impacts of agritourism?
- What are the overall policy implications?

Research Methods

The research project, conducted in 2004, was structured in three phases: Pennsylvania's agritourism past; Pennsylvania's agritourism present; and Pennsylvania's agritourism future. The findings from the past and present were compared to develop recommendations for a successful agritourism future. Research instruments included mail and telephone surveys and stakeholder interviews.

Phase one: Pennsylvania's agritourism past

The researchers reviewed secondary sources to gather information on the following topics:

- Definition of agritourism in existing research;
- Characteristics of agritourists in other states and countries;
- Characteristics of agritourism products in other states and countries;
- Industry barriers and opportunities for agritourism in other states and countries;
- Impacts of agritourism (economic, socio-cultural, environmental);
- Public policy for agritourism in other states and countries; and
- Existing public policy for agritourism in Pennsylvania including tourism development policy and agricultural development policy.

Phase two: Pennsylvania's agritourism present Agritourism inventory

The research team developed a database of potential agritourism stakeholders using a variety of sources, including the Experience PA website; Farmstop.com; the North American Farmer's Direct Marketing Association Directory; the Pennsylvania Association for Sustainable Agriculture; the state Department of Agriculture's Consumer's Guide to Pennsylvania Farm Markets; Pennsylvania Economic Development Corporations; the Pennsylvania Farm Vacation Association; the Pennsylvania Retail Farm Market Association, Inc.; the Pennsylvania State Association of County Fairs; the Pennsylvania Tourism and Lodging Association; the Pennsylvania Wine Association; Pennsylvania Small Business Development Centers; Penn State AgMap; the Pennsylvania Association of Convention and Visitors Bureaus; and the Yellow Pages website.

The study team also conducted Internet keyword searches and ordered print brochures from all 45 Pennsylvania TPAs/CVBs to conduct a manual scan of the literature to identify agritourism businesses.

The inventory of agritourism operations was compiled into a database and operations were coded with a primary classification of:

- Farm retail/dining,
- Agricultural education,
- Agricultural entertainment, or
- Agricultural lodging.

The inventory included the following information:

- Total number of agritourism operations;
- Geographic distribution of agritourism operations statewide by county, zip code, and tourist zone;
- Total count of agritourism operations by type (farm-retail/dining, agri-education, agri-entertainment, and agri-lodging); and
- Percentage of agritourism operations by type.

The inventory was refined throughout the project as the surveys were conducted. Additions and subtractions were made as necessary. A total of 1,795 agritourism operators were identified.

All agritourism operators listed in the inventory were mailed a survey. An informational mailing preceded the actual survey to notify respondents that the survey would be arriving. Midway to the survey deadline, the research team sent a reminder card. The survey covered the following topics:

- General characteristics of the operation, including scale (small, medium, large), pricing, number of employees, length of operation, types of agritourism activities;
- Importance of agritourism or other alternative enterprises to their business;
- Reasons for becoming involved in agritourism;
- Qualitative measure of the motivation for involvement in agritourism;
- Identification of industry barriers;
- Identification of industry opportunities;
- Operation capacity and visitation levels;
- Identification of positive and negative impacts of agritourism; and
- Suggestions for policy recommendations.

Of the 1,795 surveys mailed, 336 were returned for a response rate of about 19 percent. Despite the small sample size and response rate, the results provide useful insights to understanding agritourism in the state.

Agricultural operator (farmer) survey

When considering the promotion and development of Pennsylvania's rural regions, it is essential to get input from those who live and/or make their living in these regions. PASS estimates that 59,000 farms are in Pennsylvania (2003). On behalf of the research team, PASS mailed a survey to a selected random sample of 10,000 Pennsylvania farms. The sampled farms were matched with the list of contacts from the agritourism operator inventory to avoid duplication. The sample was sorted geographically and by enterprise size to account for a variety of different agricultural enterprise scales (beginning at \$1,000 per year). Since the PASS database was confidential, the research team did not send reminder cards to encourage a higher response rate. However, several agencies encouraged their members to respond, and press releases were sent to major Pennsylvania papers to encourage participation. The agricultural operator, or farmer, survey included topics such as:

- Perception of agritourism markets;
- Perception of agritourism products;
- Identification of industry barriers;
- Identification of industry opportunities;
- Identification of positive and negative impacts of the industry;
- Importance of and support for the industry and its development;
- Perceived profitability of the industry; and
- Suggestions for policy recommendations.

Usable returned surveys were compiled into a database and open-ended questions were manually coded using thematic analysis. Of the 10,000 surveys distributed, 1,465 usable surveys were returned for a response rate of 15 percent.

In the survey, respondents were asked to self-identify as agritourism operators if they wanted to participate in the agritourism inventory. Of the 1,465 farmer respondents, 227 identified themselves as agritourism operators and were mailed an agritourism survey. However, 62 of these provided insufficient details and were not included in the agritourism inventory.

State tourism and promotion agency observation and survey

While compiling the agritourism operator inventory, the study team contacted state TPAs/CVBs to request agritourism information. The team used this opportunity to determine the level of awareness of agritourism by these agencies. An observational call sheet was developed and the caller recorded if the phone respondent required clarification of the term "agritourism." The caller

recorded whether agritourism specific materials were available and the number of days it took for the requested information to arrive. Materials were then assessed upon arrival as to their agritourism content.

The executive directors of the 45 TPAs/CVBs were also surveyed by mail. These executives represent a combined membership of approximately 22,500 tourism operators throughout the state. This survey included the following content areas:

- Membership characteristics;
- Perception of agritourism markets;
- Perception of agritourism products;
- Identification of industry barriers and opportunities;
- Identification of positive and negative impacts of the industry;
- Importance of and support for the industry and its development;
- Perceived profitability of the industry; and
- Suggestions for policy recommendations.

Repeat follow-up calls and emails were made to encourage a higher response rate. Of the 45 surveys distributed, 21 were returned for a response rate of about 47 percent.

Other agritourism stakeholder interviews

The research team also consulted with many other representatives from state agencies, tourism organizations, and agricultural organizations. Stakeholders were identified using known state agricultural and tourism organizations. Interviews were conducted on the phone and in person. These informal interviews were intended to stimulate conversation about agritourism in Pennsylvania and about existing and potential public policy.

Agritourist survey

Respondents to the agritourism operator survey and TPA/CVB survey were asked if they would like to distribute surveys to their visitors; 84 respondents volunteered to do so. Only 22 of 84 were mailed survey packets because of the timing of the survey's distribution. Given the project's timeline, the research team wanted to make the surveys available to visitors for as many months as possible throughout the tourist season. The 22 volunteers were issued a packet of 50 surveys each. The survey asked visitors their age, gender, point of origin, length of stay, party size, agritourism activities, amount spent and use of marketing materials, such as the Internet, magazines and newspaper ads.

Of the 1,100 surveys distributed, 311 were returned for a response rate of about 28 percent.

Phase three: Pennsylvania's agritourism future

The last phase of the study was to compare data from all of the surveys conducted during the first two phases of the project and to assess barriers to agritourism and opportunities for the future.

Results

Goal 1: What is agritourism?

For this study, tourism was considered a cluster of many interrelated sectors including private, public and nonprofit (Gunn and Turgut, 2002). It is widely recognized that tourism operates as a system of interrelated components and, according to Gunn and Turgut, tourism is not merely hotels, airlines or the so-called tourist industry, but a system of major components linked together in an intimate and interdependent relationship (2002). This approach is widely supported in the literature (Boniface and Cooper, 1987; Davidson and Maitland, 1997; and Leiper, 1990). While different authors have classified these components in different categories, for the purposes of this research, the components of the tourism system were categorized as visitors, transportation, accommodation, facilities and services, attractions, and marketing and promotion.

The research team consulted secondary sources to develop a working definition of agritourism, and adopted the following definition from the American Farm Bureau Federation (2004):

“Agritourism refers to an enterprise at a working farm, ranch or agricultural plant conducted for the enjoyment of visitors that generates income for the owner. Agricultural tourism refers to the act of visiting a working farm or any horticultural or agricultural operation for the purpose of enjoyment, education or active involvement in the activities of the farm or operation that also adds to the economic viability of the site.”

Also using secondary sources, the study team generated classifications of agritourism activities, with the supposition that agritourism must involve agriculture and/or take place on a farm. (See Figure 1 on Page 8)

The team also identified existing public policy related to agritourism by using the Pennsylvania General Assembly's Bill Topic Index at www.legis.state.pa.us. Using the keywords “agriculture” and “tourism,” the team found and reviewed 5,728 items for their relevance to agritourism. Results were further culled through a keyword search that included variations of each keyword as recognized in the literature such as: “agritourism,”

“agricultural tourism,” “agrotourism,” and “agri-tourism.” This research was used in conjunction with stakeholder input to understand specific agricultural or tourism legislation that may contribute to agritourism barriers or opportunities in the commonwealth.

Goal 2: Who is doing it? Agritourism inventory

Surveys were distributed in two rounds: the first to those initially identified from the agritourism inventory and the second to those who self-identified from the farmer survey. Data gathered from the inventory showed that agritourism is present in every county of Pennsylvania, but is predominant in the southeastern part of the state and in Allegheny, Centre, Erie and Luzerne counties. (See Figure 2 on Page 9)

At the time of the study, the most recent economic tourism data from DCED (Shifflet, 2001) showed that Allegheny, Lancaster, and Philadelphia counties were the most productive counties in terms of direct tourism sales and employment. Upon further analysis of the state tourism data, it was apparent that the counties in which agritourism was most prevalent were among those that received the least amount of direct, indirect, and tertiary impacts from tourism through sales, jobs, compensation,

and taxes. However, Lancaster County was the exception in this case.

Marketing and promotion

Because TPAs/CVBs market tourism attractions, the study team looked to determine where agritourism operations were located based on the eight state tourism regions (See Figure 3 on Page 9).

The majority of agritourism operators were in the Hershey/Gettysburg/Dutch Country tourism region. While most TPAs/CVBs market tourism, they may not market agritourism. In fact, the results of the TPA/CVB observational call sheet showed that about 16 percent of those called asked for clarification when asked for information specifically associated with agritourism.

While 45 percent of the TPAs/CVBs called said they had agritourism specific information, only 21 percent of materials received from the TPAs/CVBs were classified by the study team as agritourism specific.

In addition to the observational exercise conducted, the research team also surveyed TPAs/CVBs to get their perspective on the agritourism industry. The results of this survey should be read with some caution, however, since they are not statistically significant given the small total population and the response rate of 47 percent.

Figure 1 : Classification of Agritourism Activities in Pennsylvania

<p><u>Farm retail/dining</u></p> <ul style="list-style-type: none"> * Roadside stand * Farm market * Christmas tree farm/cut your own * U-pick operation * Gift shop/agricultural crafts * Restaurant/food concessions * Ice cream/bakery * Corporate events/company picnics * Weddings/special events * Brewery * Winery 	<p><u>Agri-entertainment (agri-tainment)</u></p> <ul style="list-style-type: none"> * Rodeo * Agricultural fair/festival/show * Children's activities * Petting zoo * Horseback riding * Corn maze * Haunted houses/hayrides * Wagon rides * Sleigh rides * Outdoor recreation (e.g. fishing/hunting, cross country skiing, etc.)
<p><u>Agri-education</u></p> <ul style="list-style-type: none"> * School tours * Farm-related museum * Garden/nursery tours * Winery/brewery tours * Agricultural exhibits/tours * Crop identification program 	<p><u>Agri-lodging (accommodation provided on a currently operating or historic farm)</u></p> <ul style="list-style-type: none"> * Bed and breakfast * Dude/guest ranch * Country inn * Hostel * Camping/campgrounds

Figure 2: Distribution of Agritourism Providers by County

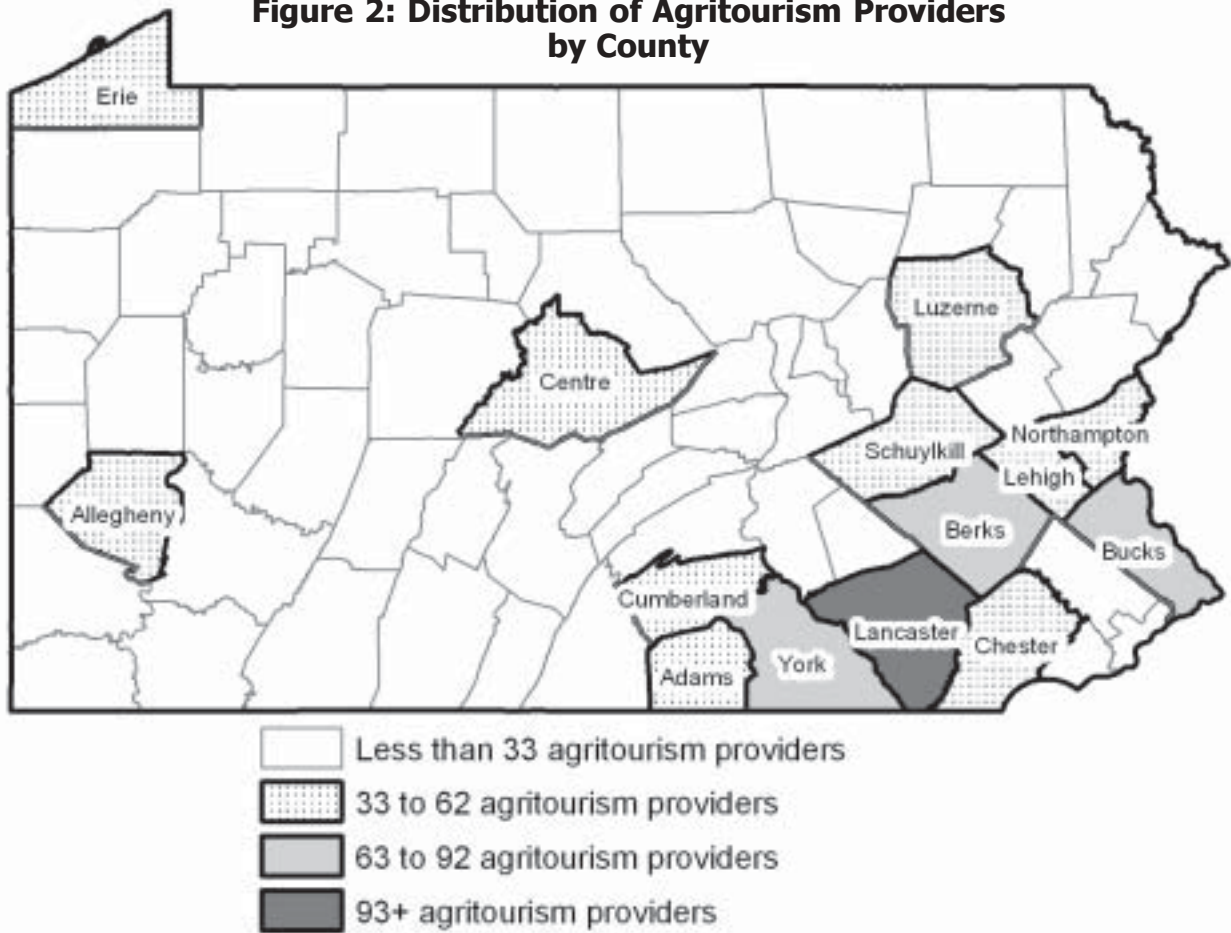
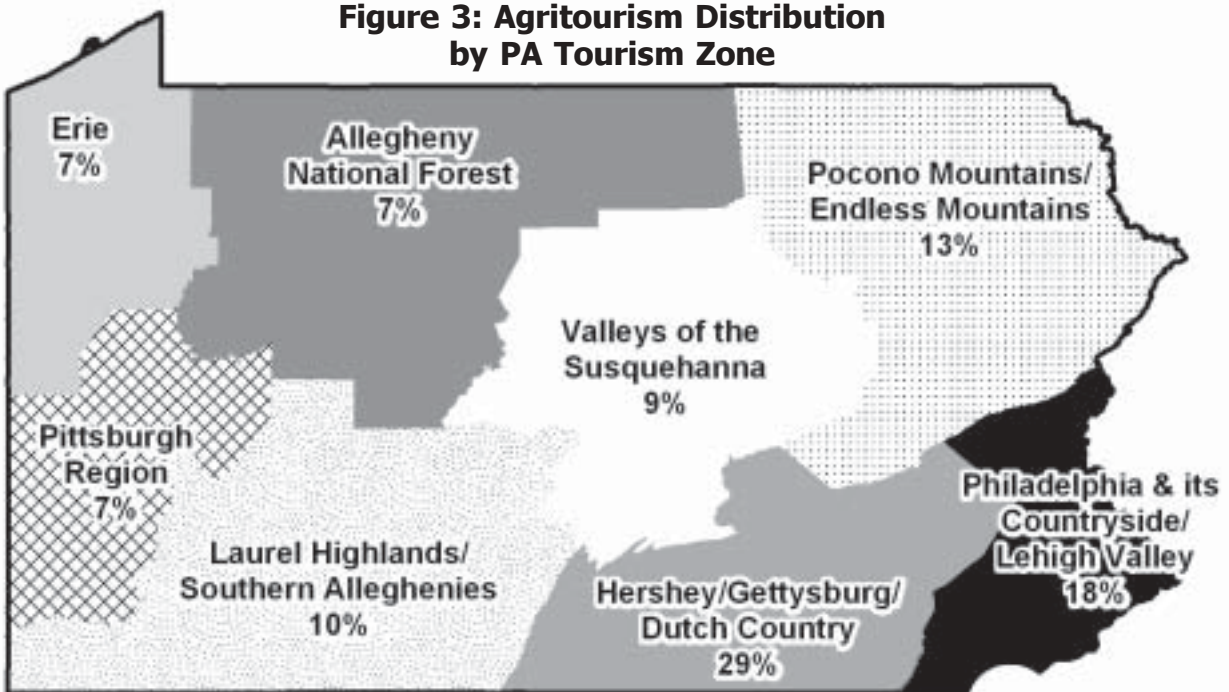


Figure 3: Agritourism Distribution by PA Tourism Zone



Pennsylvania tourism regions as of 2004 from www.experiencepa.com

Of those surveyed, 91 percent had heard the term agritourism prior to receiving materials from the study team. When asked about the region that their TPA/CVB served, 62 percent indicated that their region was specifically an agritourism destination. On average, the respondents attributed approximately 18 percent of the total geographical area they served to agritourism. Forty-five percent of respondents specifically targeted agritourism in their promotional efforts as part of the average 2003 promotional budget of \$869,598.

TPA/CVB survey respondents were also asked to describe their membership characteristics. Of those who responded, there was an average membership of 295 members, 17 of which were agritourism specific members.

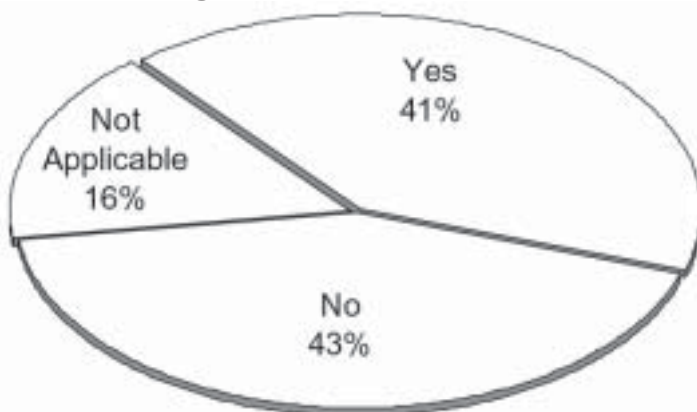
Goal 3: What are the characteristics of these businesses?

Interestingly, while all of those who took part in the agritourism survey were agritourism providers, 18 percent had never heard the term agritourism before receiving the survey or other materials from the study team.

A majority of respondents (84 percent) considered themselves to be farm retail/dining agritourism providers.

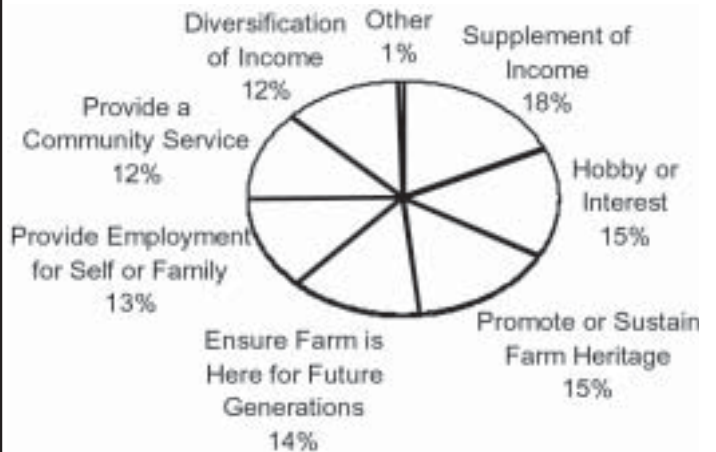
Agritourism providers were asked if they were able to support their family and/or the future of their operation without agritourism activities: 43 percent said no. (See Figure 4) Agritourism providers, on average, attributed approximately 4 percent of their total on-farm net revenue to agritourism. Additionally, an average of 1.1 members of the respondents' families worked off the farm to support the family and/or the future of the operation.

Figure 4: Are You Able to Support Your Family and/or Farm Without Agritourism Activities?



When asked about their motivations for becoming involved in agritourism, providers did not identify one overwhelming reason. Although supplement of income had the highest percentage of responses at 18 percent, there was little variation in the percentages of other responses. This indicates that agritourism operators were guided by a variety of motivations for their involvement in the agritourism industry. (See Figure 5)

Figure 5: Reasons for Involvement in Agritourism



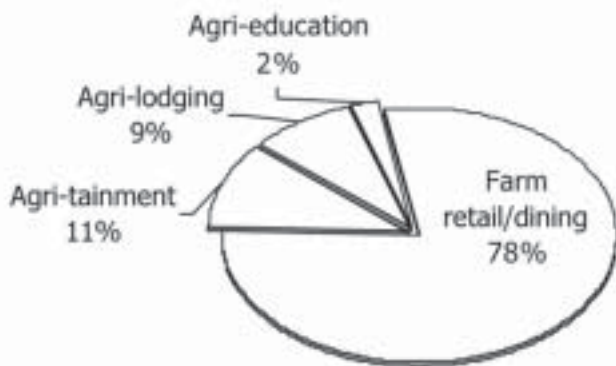
Types of agritourism activities

Although agritourism activity is concentrated geographically in some parts of the state, there is a large range of activities offered. According to the agritourism operator inventory, farm retail/dining was the largest sector of Pennsylvania's agritourism industry, accounting for about 78 percent of the total. Agri-tainment was the next largest sector at 11 percent, followed by agri-lodging at 9 percent and agri-education at 2 percent. (See Figure 6)

The agritourism operator survey asked respondents to list all agritourism activities they currently offer. Since many operators offer multiple activities, there was a total response count of 1,201. The data was coded by specific response and then coded by category as shown in Figure 1 on page 8.

Farm markets were the most widely offered farm retail/dining activity, followed by roadside stands and gift shops. School tours topped the agri-education category, followed by agricultural shows/tours and garden/nursery tours. Agricultural festivals/fairs/shows were the most offered agri-tainment activity, followed by wagon rides

Figure 6: Primary Activity of Agritourism Operator



and children’s activities. Bed and breakfasts were the most frequent type of agri-lodging activity, followed by dude/guest ranch and campgrounds. Given the breadth of possible activities, there is large growth and diversification potential for Pennsylvania’s agritourism product.

Agritourism operator characteristics

The agritourism operator survey revealed several descriptive characteristics about agritourism operations in Pennsylvania.

- The average farm size of those surveyed was about 147 acres. Of this total acreage, operators designated an average of 41 acres, or 35 percent, to agritourism.
- Agritourism operators had a slightly larger than average farm since, according to the 2002 Census of Agriculture, the average farm in Pennsylvania is 133 acres (Pennsylvania Agricultural Statistics Service, 2004).
- Pennsylvania’s agritourism operators host approximately 7,445 visitors annually. Of those respondents who offered agri-lodging, the average capacity for overnight visitors was 25.2 people. These operators hosted an average of 456.7 overnight visitors in 2003.
- An average of 3.4 family members helped to run the enterprise.
- The peak agritourism season of August, September and October does not coincide with the peak months of the general Pennsylvania tourism industry (June, July and August). Therefore, the agritourism industry provides an opportunity for Pennsylvania to diversify its product during off-peak months.

Agritourism operator use of marketing resources

Agritourism operators were asked how they attracted customers/visitors to their agritourism operation. Most relied on word of mouth followed by repeat business, newspaper ads, brochures and Internet/website. Figure 7 on Page 12 summarizes all of the possible marketing resources. The “other/specify” category included the phone book, auctions and donations/sponsorship.

Farmer involvement with agritourism

The farmer survey helped to provide answers about those operators who may have had the opportunity to be involved in agritourism but were not.

About 49 percent of respondents had heard of agritourism prior to receiving materials from the study team. The majority of farmers were dairy cattle and milk producers, other animal producers, and beef cattle ranchers and farmers. About 80 percent said they could not support their operation by farming alone. Farmers were asked if they had ever considered diversifying their agricultural operation through agritourism, and if so, why they had considered agritourism. Of the 1,465 respondents to the farmer survey, 39 percent said they had considered diversifying their agricultural operation through agritourism. The farmers’ reasons reflected those of the agritourism operators, since the most frequent response was to supplement income. However, some notable differences were that supplementing income represented 26 percent of the farmers’ responses, whereas it represented 18 percent of agritourism operators’ responses.

When the farmers were asked why they were currently not involved in agritourism, the majority cited lack of time, followed by high liability costs, advanced age (ill or retired), work off-farm/other job commitments, and no interest.

Goal 4: Who are agritourists?

Volunteers were identified to distribute surveys to agricultural tourists to and within Pennsylvania. The volunteers distributed 1,100 surveys to agritourists visiting 22 agritourism operations in each segment of agritourism from July to November. The surveys were only distributed to those age 18 and older.

Respondents returned 311 usable surveys for a response rate of 28 percent.

Visitor demographics

According to the agritourist survey, 42 percent of visitors were male and 58 percent were female.

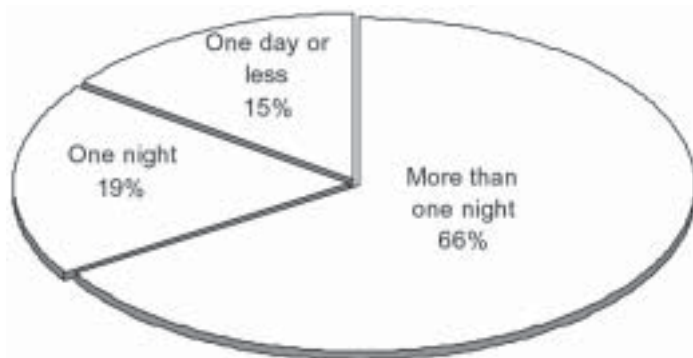
Figure 7: Agritourism Operator Use of Marketing Resources

Resource	Operator Responses by %
Word of Mouth	13%
Repeat Business	11%
Newspaper ads	8%
Brochures	7%
Internet/website	7%
Newspaper articles	6%
Billboards or signage	5%
TPA/CVB membership	4%
Press releases/free media	4%
Newsletters/posters	4%
Direct customer mailing	4%
Other membership	3%
Radio	3%
Special offers/coupons	3%
Information/welcome center	3%
Travel/book/guide	3%
Trade show/fair	3%
Magazine articles	3%
Partnerships with other businesses	2%
Magazine ads	2%
Television ads	1%
Familiarization tour	1%
Other	< 1%

While adult visitors ranged in age from 18 to 89, the average visitor was 49 years old, with a stable disposable income and some leisure time to take part in regular travel experiences.

The average visitor party size was 2.7, which included anyone age 18 and older traveling with the survey respondent. Respondents were also asked if they were traveling with children under age 18. The average

Figure 8: Visitor Length of Stay



number of party members under age 18 who were traveling with respondents was 2.6. This indicated that party sizes were typically couples or families and not large groups.

Of those surveyed, 19 percent were staying one night. About 66 percent were staying more than one night. (See Figure 8) The average length of overnight stays was about five nights.

Visitor point of origin

Using zip codes provided by the agritourist survey respondents, the research team identified the points of origin for each respondent. No international visitors responded to the survey, and the geographic distribution of the respondents was predominantly within a two to three hour drive of southeastern Pennsylvania.

Agritourist survey respondents traveled an average distance of about 447 miles from their usual place of work or residence. The researchers categorized the respondents as day-trippers/recreationalists and tourists. Day-trippers/recreationalists are individuals traveling 50 miles or less from their home or place of business. Tourists are individuals traveling 50 miles or more from their home or place of business. (Gunn and Turgut, 2002)

As part of their survey, agritourism operators were asked to estimate where most of their visitors were from in the categories of local, domestic (in-state and out-of state), and international. The majority of agritourism operators said that more than half of their net total business was local. (See Figure 9)

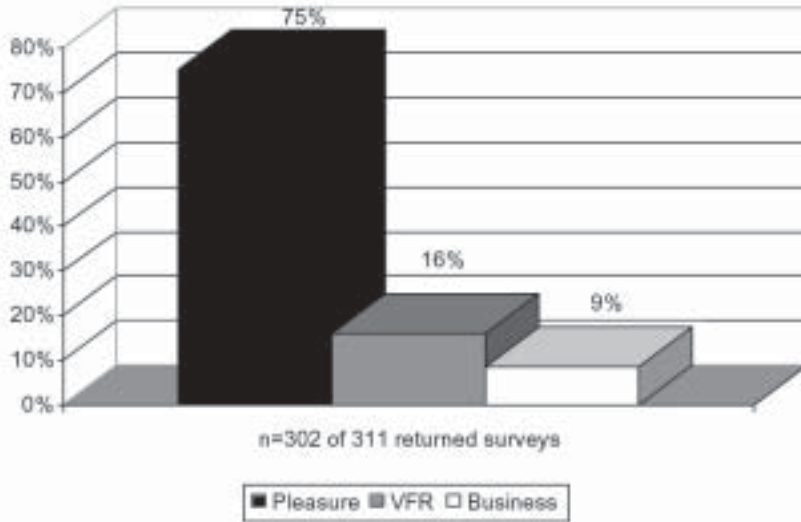
Figure 9: Agritourist Point of Origin

Point of Origin	Percentage
Local (50 mile radius, even if from another state)	68%
Domestic, in state, non-local (51 mile radius)	17%
Domestic, out-of-state (over 51 mile radius)	13%
International (from other countries, including Canada)	2%

General trip characteristics

The tourism industry largely accepts the standard classifications of business, pleasure, and visiting friends and relatives (VFR) as trip purposes (Cooper and Shepard, 1998). While visitors may have multiple trip purposes, the visitor survey asked for the primary purpose of the visit. (See Figure 10) Because agritourists were overwhelmingly partaking in pleasure trips, corporate events are a development opportunity for Pennsylvania’s agritourism industry. The lack of VFR

Figure 10: Purpose of Visit



travel was also favorable, as these types of visitors tend to contribute fewer economic benefits to the destination.

Trip expenditures

Visitors were also asked about their expenditures in six traditional tourism-spending categories. Accommodation was the highest estimated dollar amount spent by agritourists while traveling to or within Pennsylvania. Transportation and food and beverage were the other areas of top mean spending (See Figure 11). The average spending by agritourists in Pennsylvania was approximately \$120 per person visit.

When comparing spending data for all tourists, the research team found some differences in expense rankings, in that according to DCED (Shifflet, 2001), visitors to Pennsylvania spent most of their tourist dollars on transportation, followed by food and beverage, retail, accommodation, attractions, and other expenses.

Figure 11: Agritourist Expenditures Per Visit

Expenditure Category	N	Average \$ Spent
Accommodation	257	\$218.58
Transportation	272	\$134.76
Food/beverage	257	\$123.70
Retail	242	\$96.24
Attractions/activities	237	\$83.97
Other expenses	196	\$67.97
Overall average expenditure		\$120

That agritourists spent more money on accommodations than on transportation speaks to the two-to-three hour travel area from which Pennsylvania agritourists originate. Visitors’ combined geographic, demographic, and behavioral characteristics were indicative of the “short-break” tourism market (typical two night stay or less). The agritourism market in Pennsylvania is clearly comprised of visitors who are staying short term, close to home, and in smaller groups. This indicates that there is vast potential for market expansion.

Trip planning

Pennsylvania’s agritourists identified a variety of methods to gather information to plan their current trip, including the Internet/websites, information/welcome

centers, newspaper ads/articles, brochures, television ads and magazine ads.

About 61 percent of visitors used the Internet/websites as a resource for trip planning. (See Figure 12) This trend is reflected in the overall tourism industry. The

Figure 12: Trip Planning Resources Used by Agritourists

Resource	% Visitor Use
Internet/Websites	61%
Information/welcome centers	33%
Brochures	30%
Travel books/guides	27%
Word of mouth/referral	25%
Return visit	18%
Other	11%
Special offers/coupons	4%
Magazine ads	2%
Billboards or signage	2%
Newspaper articles	2%
Magazine articles	2%
Radio	2%
Television ads	2%
Newsletters/posters	2%
Trade shows or fairs	2%
Newspaper ads	1%

second most used resource at 33 percent was information/welcome centers. This would indicate that visitors might plan their trip both before and during their travels. Other most used resources were brochures (30 percent), travel books/guides (27 percent), and word of mouth/referral (25 percent).

It is interesting to note that word of mouth/referrals plays a greater marketing role in the general tourism industry. This indicates Pennsylvania agritourism does not have a strong image and is relatively unrecognized by the traveling community. It is also important to note that only 18 percent of those surveyed were return visitors, which indicates a somewhat poor return rate for visitors and/or poor visitor loyalty.

When comparing the results of the visitor survey to the agritourism operator survey, the researchers noted differences between how visitors and operators were using marketing resources. For example, operators tended to rely on word of mouth/referrals, repeat business, and newspaper ads while visitors relied on the Internet/websites, information/welcome centers and brochures. (See Figure 13)

Figure 13: Operator Use of Resources to Market Agritourism vs. Visitor Use of Resources

Resource	Operator Rank	Visitor Rank
Word of Mouth	1	5
Repeat Business	2	6
Newspaper ads	3	11
Brochures	4	3
Internet/websites	5	1
Newspaper articles	6	8
Billboards or signage	7	10
TPA/CVB membership	8	N/A
Press releases/free media	9	N/A
Newsletters/posters	10	13
Direct customer mailing	11	N/A
Special offers/coupons	14	9
Other membership	12	N/A
Radio	13	12
Information/welcome centers	15	2
Travel books/guides	16	4
Trade shows/fairs	17	14
Magazine articles	18	12
Partnerships with other businesses	19	N/A
Magazine ads	20	10
Television ads	21	13
Familiarization tour	22	N/A
Other	23	7

Visitor agritourism activities

Only 34 percent of the visitors surveyed recognized the term agritourism. This shows that many visitors are not identifying with the niche market in which they are participating.

Respondents were asked to identify all of the activities in which they had participated during their most current trip within or to Pennsylvania. The results were assessed by activity and by agritourism category. The most mentioned activity was restaurant/food concessions that involved agriculture or that took place on a farm. Interestingly, respondents also mentioned Christmas tree farm/cut your own activities even though the survey was not conducted in the winter months. The most popular activity in the farm retail/dining category was restaurant/food concessions; in the agricultural education category, the top activity was winery/brewery tours; in agricultural entertainment, it was outdoor recreation; and in agricultural lodging, it was bed and breakfasts. The most frequently mentioned alternative to agricultural lodging was staying with family and in cottages/cabins.

There are some notable differences between visitor activities and those offered by agritourism operators in Pennsylvania. School tours, which are offered by 37 percent of agritourism operators, were the most offered activity, according to the operators. This is not reflected in the visitor survey, however, because minors, who are participants in the school tours, did not participate in the visitor survey. Beyond this activity, bed and breakfasts were the second most popular activity among agritourists, yet only 8 percent of Pennsylvania's agritourism operators offer this activity.

In addition, agricultural exhibits/tours are within the top five agritourism activities offered, yet only 3 percent of respondents participated in this activity.

In spite of these initial disconnects, operators and visitors both named roadside stands, farm markets, and gift shop/agricultural crafts as common activities.

Goal 5: What is and is not working?

Agritourism operators were asked to identify a variety of potential difficulties that inhibited the development or maintenance of their agritourism operation. The difficulties were classified as follows: tax; competition; business development/financing; geographic; labor; marketing/promotion; and land use/regulations.

Agritourism operators were asked to identify specific issues within each of the categories. Following are the three most significant issues within each category as ranked by respondents.

Tax Difficulties

- Property (56 percent)
- Sales (23 percent)
- Other (16 percent)

Competition Difficulties

- From other large businesses (30 percent)
- From other local retail/agritourism businesses (29 percent)
- From agritourism industries of other states/countries (15 percent)

Business Development/Financing Difficulties

- High insurance and liability costs (38 percent)
- Local government doesn't recognize agritourism industry (16 percent)
- Can't maintain a profit from agritourism (13 percent)

Geographic Difficulties

- Seasonality and weather gets in the way of agritourism (51 percent)
- Location not near to an urban population base (30 percent)
- Crop/livestock diseases may hurt agritourism (15 percent)

Labor Difficulties

- Labor wages/workers' comp insurance too costly (30 percent)
- Not enough time to run business (24 percent)
- Labor wages/workers' comp insurance too complicated (16 percent)

Marketing/Promotion Difficulties

- Relevant agricultural or tourism organizations are not promoting agritourism (35 percent)
- No one knows what agritourism is (22 percent)
- Can't get customers to spend more money (18 percent)

Land Use/Regulations Difficulties

- Roadway signs are restrictive and expensive (18 percent)
- Building permits/building codes are too restrictive (17 percent)
- Zoning regulations are too restrictive (14 percent)

Among the seven categories of potential difficulties, respondents ranked land use regulations as the most limiting, followed by labor, marketing and

When examined as a multiple response set, the researchers found that high insurance and liability costs, which was selected by 8 percent of respondents, was the top ranked difficulty in developing agritourism operations.

promotion, tax and business development/financing problems (tie), geographic problems, and finally competition.

When examined as a multiple response set, the researchers found that high insurance and liability costs, which was selected by 8 percent of respondents, was the top ranked difficulty in developing agritourism operations. This was followed by seasonality and weather, property taxes, wages/workers' compensation too costly, and roadway signs are too restrictive and expensive.

Agritourism operators also identified factors that prevent visitors from being attracted to their area for agritourism. This provided a regional picture of the barriers to agritourism development for Pennsylvania's rural areas. Of the agritourism operators that responded, the majority said their location is too remote, isolated, or obscure (See Figure 14).

Farmers also cited regional barriers as factors that prevented agritourists from being attracted to their area for agritourism. The TPA/CVB survey asked a similar question. The top five responses were a lack of visitor accessibility; lack of ready product or agritourism product not developed in Pennsylvania; lack of visitors' awareness of agritourism and its diversity; lack of coordination between agricultural and tourism agencies; and agricultural enterprises not realizing they are tourism.

SWOT

The results from all of the surveys were also used to summarize the strengths, weaknesses, opportunities and threats (SWOT) related to agritourism in Pennsylvania.

Figure 14: Five Barriers to Attracting Agritourists

Reasons	Rank
Location is too remote, isolated, or obscure	1
High marketing costs to agritourism operators	2
Agritourism operators lack marketing experience	3
Visitors are not aware of agritourism in Pennsylvania	4
Development is causing crowding and commercialization in rural regions	5

The SWOT analysis was carried out to provide objective information and recommendations that may help shape public policy. The summary of the analysis provided below focuses on tourism products and markets, and includes recommendations based on misalignments between each.

Strengths

Pennsylvania's agritourism industry, which offers at least 30 possible agritourism activities, has several inherent strengths on which to build.

Pennsylvania has a favorable existing agritourism market. Agritourists currently demonstrate favorable characteristics in spending, party size, and length of stay. Also, given no concentrated effort as of yet to draw agritourists, Pennsylvania has drawn visitors engaging in agritourism experiences from a large geographic region.

Among the most notable strengths of Pennsylvania's agritourism industry is its rural regions, which are naturally scenic, highly attractive, and, in many regions, close to several urban markets.

Pennsylvania agritourists seek out the state's rural areas, which are safe, reasonably priced, quiet, relaxing, non-commercial, and not crowded. In addition to developing many other tourism products, Pennsylvania dedicates some effort in its promotional material to creating and maintaining its rural image in relevant geographic areas. While Pennsylvania's rural image is not fully developed, the state has the opportunity to build on a solid foundation as it considers the costs and benefits of developing this rural tourism base.

Weaknesses

One of the most noticeable weaknesses is the mixed name recognition of the agritourism industry. While recognition is strong among agritourism operators and TPAs/CVBs, it is weak among farmers and visitors.

Furthermore, in spite of good product diversity, there is a disconnect between marketing materials offered by agritourism operators and TPAs/CVBs, and the marketing materials that visitors use. When marketing was explored more thoroughly, the research found that the agritourism industry does not have a significant presence within the overall tourism industry. In addition, agritourism operators lack the financing and experience necessary to market more effectively. For example, 10 percent of the agritourism operators surveyed said a lack of marketing experience was preventing visitors from being attracted to their area for agritourism. There is also an overall lack of research, planning, or informed decision making for or by Pennsylvania's agritourism industry as much of agritourism development focuses on promotional activi-

ties and not on comprehensive and strategic research, planning, and development.

Opportunities

There are typically four types of opportunities for tourism development: market, product, market penetration and diversification. Given the results of this study, Pennsylvania's agritourism industry has a substantive product and market base. Pennsylvania should explore enhancing its existing products and developing new markets.

Threats

The major threat to Pennsylvania's agritourism industry is that surrounding states are more advanced in developing and marketing their industries. For example, New York and New Jersey have formally defined their agritourism industries and their significance, and have actively recognized and developed these industries because of earlier agritourism studies and formal legislative considerations. Pennsylvania's agritourism industry is also threatened by growing agritourism industries in West Virginia and Ohio. Pennsylvania must be aware that, while its agritourism industry is regionally dispersed, each region is threatened by the competition of surrounding states.

Goal 6: What are the impacts?

On average, approximately 90 percent of everyone surveyed, including agritourism operators, farmers and TPAs/CVBs, said that agritourism was an economic growth opportunity for Pennsylvania's rural regions. However, tourism has the potential to generate positive and negative impacts for sites, regions, and the commonwealth. All tourism development must be researched, planned, and managed within the context of the possibilities of these impacts.

While this study did not include a full tourism impact analysis, it compiled some potential concerns and benefits perceived about agritourism by farmers.

Concerns about agritourism development

While there are several barriers and opportunities to agritourism development, farmers also cited some economic, environmental and socio-cultural consequences that may result from tourism development.

After reviewing the literature related to agritourism, the research team compiled a list of possible rural concerns and benefits of agritourism development. The list was included in the farmer survey, and respondents

Figure 15: Farmer Responses: Concerns with Developing Agritourism

	Very Concerned	Concerned	Not Concerned
Economic Concerns			
Inflated property values	20%	31%	49%
Inflated prices of local goods/services	12%	29%	59%
Rural areas lack tourism development experience	13%	41%	46%
Social or Cultural Concerns			
Disruption of rural lifestyles	28%	39%	34%
Increased crime	24 %	40%	36%
Increased traffic congestion	32%	41%	27%
Increased terrorism potential	12%	23%	65%
Availability of seasonal/part-time work	8%	35%	57%
Loss of privacy	36%	43%	21%
Increased noise	26%	38%	36%
Stress on community services (health, police, etc.)	15%	33%	52%
Overload of community infrastructure (roads, water, etc.)	23%	38%	39%
Environmental Concerns			
Soil erosion, clearance of vegetation	18%	36%	46%
Water or air pollution	20%	37%	42%
Disruption of wildlife/livestock	29%	40%	31%
Increased building development	39%	38%	22%
Loss of farmland to tourism use	37%	36%	27%
Detraction of visual quality of the landscape	30%	40%	30%

were asked to rate each of the possible concerns they may have about developing agritourism in their rural area by selecting “very concerned,” “concerned” or “not concerned.” Figure 15 provides a summary of their responses.

The following five issues were very concerning to 30 percent or more of the respondents:

- Increased building development;
- Loss of farmland to tourism use;
- Loss of privacy;
- Increased traffic congestion; and
- Detraction of visual quality of the rural landscape.

At least half of the respondents were not concerned about increased terrorism potential, inflated prices of

local goods and services, availability of seasonal/part-time work, and stress on community services.

Respondents also listed concerns not included in the list. The most frequent economic concerns listed were “liability and insurance,” “higher taxes” and “visitor trespassing.” The top two social or cultural concerns cited were “false image of farming” and “devaluing farmers’ role as a producer,” and the most frequent environmental concern was “litter and trash.”

Benefits of agritourism development

Farmers were also asked to rate the possible benefits of agritourism development in their rural areas. Respondents were asked to review a list of possible benefits of developing agritourism in their rural area and to rate the listed

Figure 16: Farmer Responses: Benefits to Developing Agritourism

	Very Beneficial	Beneficial	Not Beneficial
Economic Benefits			
Economic diversification/stabilization for rural areas	15%	69%	16%
Job creation in rural areas	14%	69%	17%
More tourists to area	8%	57%	35%
Business in community will benefit	17%	70%	13%
Increased awareness of PA agricultural products	33%	58%	9%
Social or Cultural benefits			
Preservation of rural lifestyles	23%	47%	30%
Increased awareness of rural heritage	26%	62%	12%
Increased awareness of ag issues by general public	34%	57%	9%
Improvement of community facilities and services	12%	54%	34%
Increased sense of community pride	18%	62%	20%
Environmental Benefits			
Better environmental management	16%	58%	26%
Protection/preservation of agricultural land	35%	49%	16%
Restoration of agricultural heritage sites	27%	57%	16%
Greater use of assets (buildings, woods, garages etc.)	23%	58%	19%

options as “very beneficial,” “beneficial” or “not beneficial.” Figure 16 provides a summary of the responses.

The following five issues were seen as very beneficial to at least 25 percent of the respondents:

- Protection/preservation of agricultural land;
- Increased awareness of agricultural issues by the public;
- Increased awareness of Pennsylvania’s agricultural products;
- Restoration of agricultural heritage sites; and
- Increased awareness of rural heritage.

Respondents also added other benefits to the list. The most frequently added economic benefit was “increased income to offset local taxes.” The most frequently added social or cultural benefit was “educate people where food comes from.” And, the most frequently added environmental benefit was “protection from urban developers.”

Impact of specific groups on agritourism

When asked to identify the group or groups that had the greatest impact on the development and sustainability of agritourism, more than half of the agritourism operators cited retail operators and themselves. When asked to identify the level of government that had the greatest impact on developing the industry, about 52 percent of agritourism operators cited the state government. More than 73 percent of TPAs/CVBs cited state government.

When asked to identify the level of government that had the greatest impact on developing the industry, about 52 percent of agritourism operators cited the state government.

Goal 7: What are the policy implications?

Following are some suggested solutions in terms of public policy, programming, and funding for key problems in Pennsylvania's agritourism industry as uncovered by the research.

Statewide education, coordination and training

A statewide infrastructure should be developed to provide agritourism education and training for farmers, tourism professionals, civic leaders, and all present and potential stakeholders. Those in the tourism and agricultural communities need the educational infrastructure to "cross-pollinate" their expertise to develop the new and improved industry of agritourism. Civic leaders need to be educated about the economic potential of successful agritourism, which brings jobs, visitors and increased revenue into the community. They also need to be educated in terms of changes to zoning, signage requirements, and taxation that would help sustain these businesses. All must realize that the small farmer is now in the land management business, rather than just the farming business, and that the community must work together to help the income from this land just as they would for a business in the heart of a city.

Civic leaders need to be educated about the economic potential of successful agritourism, which brings jobs, visitors and increased revenue into the community. They also need to be educated in terms of changes to zoning, signage requirements, and taxation that would help sustain these businesses.

With education, interested farmers could overcome perceived barriers to providing agritourism opportunities since many farmers see liability insurance and the perils of trying something new as too overwhelming.

Existing agritourism operators made it clear that they do not necessarily need financial assistance but rather practical assistance, with skills such as marketing, customer relations, staff hiring and training, business planning, and risk management. Agricultural associations, extension services, university research departments and others have done well in keeping the farmer advised on new seed sources, crop protection, new cultivars, new animal breeds and business development. However, the

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how-tos of marketing for these enterprises have not been a focus in the past and may be a logical avenue for agritourism educators to pursue.

Pennsylvania State University Cooperative Extension has been offering workshops on agritourism to Pennsylvania's rural citizens. These efforts should continue and be further developed and publicized. In addition, Cooperative Extension or the Small Business Development Centers may consider developing a "train the trainer" program so that rural citizens could conduct agritourism workshops/seminars in their communities.

In 2004, the Department of Agriculture's Division of County Fairs implemented its Agritourism Initiative, intended to promote farm markets, wineries, farm vacation bed and breakfasts and corn mazes. This project also initiated the Blue Ribbon Passport in 2005, in conjunction with the Pennsylvania State Association of County Fairs (2005). The Department of Agriculture's Division of County Fairs' Agritourism Initiative is commendable. However, while the state departments of Agriculture and Community and Economic Development consider agritourism, they should develop stronger connections to create a more concentrated agritourism presence. While every niche product within the overall tourism sector cannot be recognized on a large scale, the synthesis of these two important industries in the commonwealth surely justifies greater representation.

The state may consider developing a Pennsylvania Agritourism Advisory Council (PAAC), which would be similar to or under the umbrella of the Pennsylvania Travel and Tourism Partnership (PTTP) (www.legis.state.pa, 2004). This agency could be comprised of appropriate private and public agricultural and tourism representatives, which would at least include representatives from the Department of Agriculture and the Pennsylvania Office of Tourism within DCED. It is also recommended that the PTTP form an agritourism subcommittee to act as an advocate for the agritourism industry. The researchers do not recommend the establishment of a new office for agritourism. However, the proposed PAAC may provide more opportunities for state and private agencies to work together more closely.

Defining agritourism

A 2004 amendment to Act 319 of 1974, commonly known as Clean and Green, defined agri-tainment for property tax purposes.

Additional consideration should be given to further defining agritourism for use of land issues. For example, Act 133 of 1982, the Right to Farm Act, may be amended to allow agritourism to be considered a normal agricultural operation.

Agritourism marketing and advertising

Although there has been some admirable agritourism/rural tourism marketing done by state agencies and private organizations, a more comprehensive effort needs to be made. The directory of registered agritourism providers, with the user's consent, could be made public in print and on a website for prospective visitors. While Visitpa.com includes agritourism in its Arts and Entertainment page, the state may also consider a separate website, which may include an interactive map of all registered businesses. The Pennsylvania Tourism Office may also consider developing a separate brochure specifically for agritourism to distribute in state Welcome Centers.

Since most agritourist traffic is vehicular, road signage is essential to assist in advertising agritourism attractions and to direct potential customers/visitors to those sites.

Since most agritourist traffic is vehicular, road signage is essential to assist in advertising agritourism attractions and to direct potential customers/visitors to those sites. The Pennsylvania Department of Transportation and the Pennsylvania Turnpike Commission already provide an invaluable service to the agritourism industry through the maintenance of their 14 combined Welcome Centers (Pennsylvania Department of Transportation, 2004). Outdoor advertising is subject to restrictions of the Federal Highway Administration and the Highway Beautification Act of 1965 (Outdoor Advertising Association of America, 2004). PA Code Chapter 445, Outdoor Advertising Devices, currently does not consider agricultural land commercial. While agritourism operators should not be exempt from the code, special provisions should be made so that the signage needs of agritourism operators are met.

The Pennsylvania Logo Signing Program (as administered by the Pennsylvania Tourism and Lodging Association) is not providing adequate tourism directional and orientation signage in Pennsylvania's rural regions. This signage offers little visual appeal and largely does not serve rural areas.

The Commonwealth is in need of a large tourism orientation and directional signage system, which projects the image of "Pennsylvania the State of Independence" and codes tourist attractions, accommodation, facilities/services, and transportation by recognizable symbols.

Agritourism could benefit from having its own symbol on this signage. Visitors should also be introduced to tourism regions through signage.

Startup assistance for agritourism

The First Industries Fund, while an excellent initiative, separates agriculture and tourism into the Agriculture Development Fund and Tourism Development Fund (www.newPA.com, 2004). The state may consider adding an Agritourism Development Fund, which would synthesize the application requirements for the agriculture and tourism categories. If the First Industries Fund cannot be amended, then a separate loan, loan guarantee, and/or grant program may be developed through either the Department of Agriculture or DCED to provide more resources to agritourism operations.

A how-to guide, which includes information on all regulations that affect existing or potential agritourism operators, business planning, decision-making tools, management information, marketing, customer service, best practices examples, and other practical information, may also be developed. The information generated by this study may serve as a foundation for this guide. The guide could be widely distributed by the Pennsylvania Department of Agriculture, Cooperative Extension, the Small Business Development Centers, the Pennsylvania Office of Tourism, the Pennsylvania Association of Convention and Visitors Bureaus and other related tourism and agricultural organizations.

Informed decision making

Currently, the Travel and Tourism Act emphasizes the advisory role of the Pennsylvania Travel and Tourism Partnership (PTTP) to tourism marketing and infrastructure improvements. A successful tourism industry in the commonwealth, whether agritourism or otherwise, depends on the development of tourism through informed

decision making. Minimally, the Agricultural Statistics Service and the Office of Tourism should be accounting for tourism in their data gathering from their varied perspectives of product and market focus, so that the PTTP, in its advisory capacity, may have tourism-specific information to analyze tourism trends in regard to agritourism.

The state's academic institutions with tourism programs and their students, especially those within the State System of Higher Education, should be seen as a resource to provide ongoing and up-to-date industry information to supplement what is available annually from the Department of Agriculture and the Office of Tourism.

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