

Article

Qualitative Assessment of Agritourism Development Support Schemes in Italy, the USA and South Africa

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Abstract: Agritourism has grown rapidly in many countries worldwide. However, for all this success, little is known about the concrete implementation, actual extent, and effectiveness of public and private agritourism support measures aimed at keeping up farming and promoting agritourism. Hence, the objective of this study is to provide an overview and a comparison of agritourism supports and policies in different countries. To this purpose, specific political, legal, financial, and promotional instruments for agritourism have been investigated. The focus is on three countries with strong agritourism sectors and different socio-cultural characteristics: Italy, the USA, and South Africa. The analysis of these case study areas is motivated by examination of agritourism from different continents with a diverging status of development as well as history. Italy and the USA are two countries with well-established and successful agritourism sectors; however, these are based on very different framework conditions, resulting in specific development paths and various supportive driving factors. South Africa has been included as a representative case study of a developing country where agritourism operations are growing rapidly through the support of an active private sector association. By assessing commonalities and differences in public and private support backgrounds in three different continents, the present study represents the first exploratory attempt to understand the influences of public and private national and regional framework conditions for agritourism development. Our findings suggest that both public and private supports contribute to success; however, clear criteria and further research are needed in order to fully understand the implications.

Keywords: agritourism policies; agritourism regulations; tourism support measures; subsidies; agritourism development



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1. Introduction

In many countries, rural areas are significant because they supply a variety of economic opportunities as along with ecosystem services such as living spaces and natural resources. Natural systems are part of a paradigm shift in Western rural areas over the last few decades, although the countryside has always been viewed through the lens of economic sectors. Agriculture was once the most important rural sector, with an emphasis on both food and non-food agricultural goods production (e.g., cotton). In 1992, at the Rio Earth Summit, the definition “multi-functionality of agriculture” was coined to describe these services, which has currently been incorporated into the European Union’s Common Agricultural Policy [1].

The concept of multi-functionality refers to the idea that agriculture, in addition to physical commodities, produces non-commodity outcomes or services such as landscape beauty and environmental externalities, as well as social and cultural benefits (e.g., traditional heritage, cultural customs) [2]. Farmers are able to access extra income sources through farm diversification activities by delivering such services to rural communities as well as to the society as a whole. Agritourism represents one of these activities. Tourists who pay for sleeping and/or eating on a farm may help stabilise a declining traditional farming sector by creating a synergy between two economically different business activities, namely, farming and tourism. In recent decades, agritourism has grown rapidly in many countries worldwide [2]. However, for all this success, little is known about the concrete implementation, actual extent, and effectiveness of various public (financial) and private agritourism support measures generally aimed at preserving (small-scale) farming in many countries. Furthermore, most of the research on agritourism has focused on Western countries, resulting in a lack of understanding of the status of the sector in less developed countries [3].

In detail, the present research is focused on three countries with a strong agriculture and agritourism sector and with different socio-cultural characteristics: Italy, the USA, and South Africa. The investigation of these three different case study areas is motivated by confronting agritourism from different continents with a diverging status in terms of their development and history. Italy and the USA are two countries with well-established and successful agritourism sectors; however, this is based on very different framework conditions, resulting in specific development paths and various supportive driving factors. South Africa has been included as a representative case study of a developing country where agritourism activities are growing rapidly through the support of an active sector association. In the same vein, over the years Italy and USA have developed regulatory systems aimed at defining, orienting, and supporting agritourism activities, while South Africa has not yet implemented any development policies for agritourism sector. Nevertheless, we refer to the activity of the association *Rural Tourism Africa*, which represents a unique initiative building a strong and recognizable brand that stands for integrity. The association won the World Agritourism 2021 Award for introducing Agritourism into Africa, thereby assisting in the development of sustainable entrepreneurship opportunities on the continent. Additional support systems are limited to specific agritourism activities, mainly involving animal-based tourism such as hunting and petting zoos [4].

Hence, the objective of this explorative study is to provide an overview and a comparison of the development of different support measures and schemes by applying a multiple case study analysis. For this purpose, we specifically refer to two different support schemes, namely, public and private support systems. A more extensive definition of these support measures is provided within Table 1.

The article is structured as follows. The next section, Section 2, deepens the state of the art and theoretical background on the supporting measures driving agritourism development. Section 3 describes the methodological approach of multiple case studies analysis and the procedure adopted, while Section 4 analyses the national support framework in Italy and the USA, specifically the regional support cases of the Italian Autonomous Province of Bolzano (“South Tyrol”) and Vermont in the USA. Afterwards, we present the case of South Africa, a country with no public support and a strong national private agritourism association. Section 5 provides a discussion of our investigation and draws conclusions.

2. State of the Art

Various studies show that agritourism enables additional income from tourist activities and experiences, such as accommodations or gastronomic services on the farm [5,6]. Thus, agritourism represents an on-farm diversification activity that valorises the assets of the farm, farming (including products), and the location in order to gain additional agricultural income from tourism [5,6]. In many cases, it is the low agricultural income and the high income possibilities from tourism that motivate farmers to start agritourism [6–10].

Nevertheless, a unique and standardized definition for agritourism activities has not been agreed upon. Indeed, the exact definition of agritourism varies from country to country. In Italy, even at the regional level one can distinguish different approaches with higher and lower limits for tourism, i.e., tourist facilities, and thus different options for higher or limited tourist commercialisation in the sector. While several countries apply binding rules based on a legal framework (e.g., Italy), in other countries private associations mainly set out quality standards (e.g., Austria, Germany). Agritourism can be seen as a form of sustainable tourism or ecotourism integrated into the wider “framework of rural tourism” [7] (p. 261). Recent developments in the sector call for a “distinction between authentic agritourism and other types of rural tourism” such as “commercial agritourism” or “countryside tourism” [7] (p. 261). An active working and non-working farm and the way the farm is altered (staged) by specific tourist facilities are the key differentiating factors between these concepts (Figure 1). Working guests within volunteer work or WWOOFing (Worldwide Opportunities on Organic Farms/WWOOF) cannot be considered as types of tourism in rural areas under this definition.

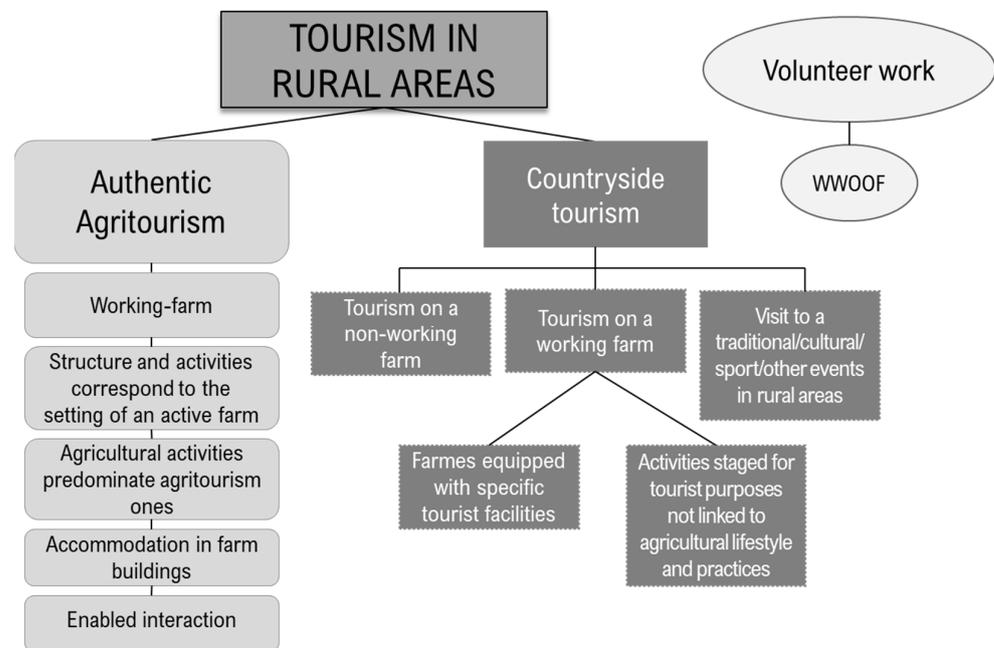


Figure 1. Features of authentic agritourism establishments compared to those of countryside tourism. Source: adapted and slightly modified from [6].

As for the USA, while the concept of visiting farms and ranches is not new, the term agritourism was likely adapted from the Italian word *agriturismo* in the late 1980s. Agritourism, agrotourism, agricultural tourism, farm tourism, farm visits, farm-based education, agritainment, and various other terms are used in different contexts, with agritourism being preferred for academic usage. However, the USA does not have a standard definition of agritourism for the purpose of policy and regulation at the national level. In practice, agritourism takes on a wide variety of forms that fall into five overlapping categories: direct sales of farm products, education, hospitality, outdoor recreation, and entertainment. Examples of direct sales includes pick-your-own fruit as well as farm stands selling local products. Education includes workshops and classes on farms about food production as well as school field trips. Hospitality includes overnight farm stays. Outdoor recreation might include horseback riding and hunting. Entertainment can include hayrides and corn mazes. The core of agritourism in the USA is on-farm experiences deeply connected to agricultural production [11].

In the academic literature regarding Italy, several studies have focused on economic and social advantages of activities in agritourism [12–16]; however, only a few have focused

on support schemes. A relevant article is the one published by Giaccio and colleagues in 2018, which analyses the impact of European (hereinafter EU) and national rural policies on Italian tourism. However, this paper investigated only the effects of the legislation as of 2015, with reference to the time period of 2007–2013 for EU programming. According to a more recent paper from 2022, a positive relationship has been noted between farms with tourism activities and 2nd Pillar payments for rural development in Italy [17]. In their 2018 paper, Sgroi and colleagues instead provided an overview of how public contributions are allocated for Sicilian agritourism activities. They illustrated that the supply of agritourism businesses is changing, with a greater emphasis on promoting, growing, and enhancing the value of the environment and rural surroundings. This point plays an essential role as it is the basis for government funding in this area [18]. Nevertheless, as the authors themselves state, the results cannot be generalized as they relate specifically to the specific situation under investigation [18]. In the annual reports of ISMEA (Institute of Services for the Agricultural and Food Market) on the development of agritourism in Italy, there is a section dedicated to legislative changes both at the national level and in the individual regions. Most changes in recent years relate to two macro-themes: sectoral guidelines (general, tourist accommodation, catering, recreational and educational activities, summer centres, etc.) to prevent and contain the spread of COVID-19, and support for of businesses, by means of non-repayable grants and various facilities (social security, tax, etc.). On the European level, an article published in 2015 by Papadopoulos [19] provides a review of the impact of the CAP on agriculture and rural areas of European member states, though without looking into the legislation of individual countries or agritourism specifically. The literature is unanimous in its assessment of the decision to diversify farm activities that are highly dependent on EU subsidies [20].

Concerning the United States, the situation in the literature is very similar to that of Italy. There are several studies on agritourism in the United States [15,20–24], although very few focus on the country's policies. A study performed by Kapała in 2020 analysed the legal instruments used to support local food systems in United States law, including agritourism [25]. However, this study was limited to the context of food sales. In a report from the Vermont Law School Center for Agriculture and Food Systems [26], different definitions and legislation concerning agritourism were divided by state, along with the most recent policies adopted. Many of the 50 states in the USA have different definitions of agritourism as well as different laws, which may be one of the confounding reasons limiting research articles on this topic. The lack of national oversight and resulting variability in regulations throughout the USA creates inconsistent environments for agritourism operators, in which producers may find the regulations to be major barriers. An online survey of farms and ranches with agritourism and on-farm direct sales occurred in 2019 [27]. Answers were received from 1834 farms and ranches representing all 50 states. In response to a question about challenges for agritourism operators, 81% of respondents identified concern about agritourism liability issues as a challenge and 80% felt that cost/availability of liability insurance was a challenge. State and local regulations were reported to be a challenge by 72% of respondents, and 54% expressed concern about city/county zoning and permitting.

The literature regarding agritourism in South Africa is limited and has only gained significant attention from scholars within the last ten to fifteen years. As stated by Viljoen and Tlabela in their 2007 study [28], agritourism is a fairly recent phenomenon in the country, beginning with ostrich farms in Oudtshoorn in the southern Cape and the development of the first Western Cape wine route in 1971. While several studies have focused on agritourism activities in various areas [4,29–31], the majority of these studies focus on the Western Cape region and its wine routes [31–33]. However, there is no research examining the policies and regulations around agritourism, as there is currently no regulatory system for agritourism in the country. There are, however, national and provincial tourism legislation, policies, and guidelines that are standard for all tourism related products in South Africa, for example, the White Paper [34]. Limited support schemes are available

focusing on very specific agritourism activities, for example, hunting [35]. Most of the policies and legislation provided by both government and non-government organisations are focused on wildlife conservation, especially during wildlife encounters involving tourists. Accordingly, in the next sections a multiple case study analysis is applied in which public support systems (i.e., policies, laws, and regulations, which provide the general legal and administrative framework for agritourism development) are considered for Italy and the USA, while private support schemes (i.e., professional associations that seek to advance the interests of farmers and organisations engaged in agritourism activities) are considered for all three countries.

3. Theoretical Background and Methodological Approach

A multiple case study analysis [36–41] methodology was used to investigate and comprehend the research setting [42]. The case study investigation addresses a technically unique circumstance in which there are far more factors of interest than data points. This qualitative method is based on various sources of information, with data requiring comparison and triangulation. Multiple case studies are often employed to generate material for a debate on a specific subject. Case studies are usually open-ended and are frequently applied in circumstances in which a unique solution is difficult to determine). By applying a multiple case study, the aim of the present research is to understand and illustrate the differences and similarities between the cases [37,43]. The analysis will shed light on the current public and private support schemes available at the national and regional levels, allowing for a better understanding of the factors impacting agritourism development.

Based on the protocol in Table 1, we built a systematic procedure for our multiple case study analysis.

Table 1. Protocol adopted for analysis of the case studies.

Study propositions	<ul style="list-style-type: none"> – To improve knowledge of the current public and private support schemes driving agritourism development in different countries – To provide a discussion and a cross-country comparison of agritourism support measures and schemes
Study questions	<ol style="list-style-type: none"> 1. Are there any public/private support schemes driving agritourism development? 2. Which are the current support schemes (public/private) developed at national level driving agritourism establishment? 3. Which are the current support schemes (public/private) developed at regional level driving agritourism establishment?
Unit of analysis	<ul style="list-style-type: none"> • Italy (national level); South Tyrol (regional level) • USA (national level); Vermont (regional level) • South Africa (national level)
Linking data to propositions	<p>Investigation of current public and private measures supporting agritourism development:</p> <ol style="list-style-type: none"> 1. Public support systems: policies, laws, and regulations, which provide the general legal and administrative framework for agritourism development [4], defined as: <ul style="list-style-type: none"> – Policy: a political, managerial, financial, or administrative mechanism implemented to reach explicit goals. In the political sphere, policies are devised by politicians and executive administrators and serve as guidelines for follow-up laws and regulations – Laws: a set of rules created by legislative politicians and administrators and enforced through social or governmental institutions to regulate behaviour. Laws shape daily life more explicitly than more abstract policies – Regulation: if state-mandated, is a government intervention to implement policy and thus produce desired outcomes. It is devised by executive administrators, may take the form of decrees, executive orders, by-laws, directives, or acts 2. Private support systems: professional associations that seek the interests of farmers and organisations engaged in agritourism activities

Table 1. Cont.

Source of information	<ul style="list-style-type: none"> • National regulation repositories • Regional regulatory repositories • Provincial regulatory repositories • Italian Rural Network • Professional Agritourism Associations • National statistical institutes • Regional statistical institutes
Criteria for interpreting the study's findings	<ul style="list-style-type: none"> – Definition of the sector and the activities admitted – Existence of agritourism policies or regulations at national level – Existence of agritourism policies or regulations at regional level – Existence of agritourism private sector support activities at national level – Existence of agritourism private sector support activities at regional level – Public subsidies for agritourism development/maintenance – Agritourism annual growth rate

From October to November 2021, different sources of information were analysed in order to gather material to answer to the research questions. Key informants from professional associations which contributed and/or are contributing to the development of agritourism businesses in the target countries were identified and interviewed.

The heterogeneous nature of this comparison allows for analysis of different development paths and discussion of divergent factors of success in promoting agritourism. We show that the development of this sector in South Africa is enabled by other factors than sectoral policies. Thus, the investigation is worthwhile for describing both well-developed and developing experiences which can pave the way for further and future investigation while orienting policymakers and professional associations towards successful implementation of agritourism activities.

The following sections report the findings of our analyses and compare the three case study countries based on the criteria for interpreting the study's findings expressed in Table 1.

4. Case Study Analysis: Public and Private Support Schemes

4.1. Public Support: Italy (EU)

In the EU, there are various funding programmes within the Multiannual Financial Framework which generally promote tourism in rural areas for the period of 2021–2027. However, to the best of our knowledge no specific support schemes on EU level, including the Next GenerationEU program, that are explicitly dedicated to agritourism. In addition to research programs intended to enhance skills and create jobs (ESF), the EU addresses and promotes rural tourism within its rural development policies [44,45]. The most relevant EU funding schemes to support the setting up, running, and extension of rural tourism/agritourism are the European Agricultural Fund for Rural Development (EAFRD) (second pillar rural development), European Regional Development Fund (ERDF), and Cohesion Fund. The European Agricultural Fund for Rural Development Regulation (EAFRD) generally supports “sustainable and responsible tourism in rural areas, natural and cultural heritage” (No 1305/2013, Recital 18) [46]. Within this framework, EU countries have the possibility of including tourism-related investments in their CAP strategic plans. “Diversifying a farm’s income by investing in agro-tourism” is one funding example within this scheme (European Union and EU Regulations refer to agritourism activities using the prefix “agro-”, while we use the prefix “agri-” throughout this paper.). An unambiguous definition by the EU does not exist, and varying terms are used in policies: “agri-tourism” should be developed in 2007 and 2013 (Art. 3.3, viii), whereas in 2014 and 2020 the EU promotes “Projects that bring together agriculture and rural tourism through the promotion of sustainable and responsible tourism in rural areas” [47]. In addition to ecotourism and medical tourism, the recent EU Strategy for sustainable tourism (European Parliament, 2021) [48] defines agro- and rural tourism as new alternative trends in tourism.

In Italy, agritourism as an activity was legally recognised for the first time within the National Framework Law No. 730 of 5 December, 1985 (Italian Framework Law, 1985) [49]. Currently, it is dealt with under Law No. 96 of 20 February, 2006, “Discipline of agritourism” [50], which regulates and defines agritourism as a business in which “hospitality and accommodation activities are carried out by farmers using their farm facilities in close connection with cultivation, forestry and animal breeding activities” (Art. 2).

The key purposes of agritourism activities are linked to several aspects connected to the maintenance and the enhancement of the rural territory, such as: (i) the protection, qualification, and enhancement of the specific resources of each territory; (ii) the support of typical production, quality production, and related food and wine traditions; and (iii) the maintenance of human activities in rural areas (Article 1), to mention only a few. Consequently, those activities that can be considered within the framework of agritourism are related to the following hospitality proposals: (a) the provision of hospitality in accommodation or open spaces for campers; (b) the provision of food and/or beverages consisting mainly of agritourism production and products from neighbouring farms, with preference for local products and/or products bearing EU denomination of origin labels (PDO, PGI, DOC and DOCG); (c) the organisation of tastings of farm products; and (iv) the organisation of recreational, cultural, educational, sporting and excursion activities aimed at enhancing the local territory and the rural heritage (Article 2).

Article n.4 of Law 96/2006 defines agritourism activities as a competence of Italian regions/provinces, which oversee the definition of criteria, limits, subsidy allocation, and administrative obligations for carrying out the activities while paying attention to the peculiarities and characteristics of the regional territory. Therefore, in Italy, twenty-one regional/provincial laws regulate agritourism businesses, focusing on agritourism management with respect to agricultural activity, which must, in any case, be prevalent. Particular attention is paid to the working time devoted to agricultural activities, which must prevail over that dedicated to agritourism even if agritourism involves many activities. For instance, catering and food and beverage provisioning must comply with food safety and hygiene standards, while accommodation must comply with host security issues, to mention the most popular activities supplied at the agritourism level. Therefore, both regional/provincial norms and those standards, norms and acts related to multifunctional activities regulate agritourism management supplied at the farm level. In this respect, the Italian Rural Network has developed a database that collects all regulations related to agritourism and multifunctional activities.

Currently, 112 norms (see Appendix A) have been grouped according to the activity to be regulated (i.e., general rules of agritourism, rules of the sector, processing and direct sale of agricultural products, social farming, etcetera). As far as taxation is concerned, agritourism is subject to a favourable regime governed by Article 5 of Law No 413 of 30 December, 1991 (Italian Law, 1991) [51]. The law establishes a flat-rate scheme applicable to agricultural entrepreneurs running agritourism activities who comply with the administrative authorisations provided by the respective regional laws. According to this system, income from agritourism and revenues from educational and social activities are not included in farm income, and are instead subject to a flat-rate determination equal to 25% of income net without VAT, while the VAT amounts to a flat rate of 50% of any VAT collected (social and educational activities are exempt from VAT where recognised in official public lists).

The evolution of agritourism companies in Italy has shown strong positive medium/long-term performance of the sector over the years. According to the Italian National Institute of Statistics [52], between 2007 and 2019 the number of agritourism activities increased by +38.7%, (Figure 2 and Appendix B), with a total economic value over EUR 1.5 billion in 2019 (+3.3% compared to 2018 and + 37% compared to 2007).

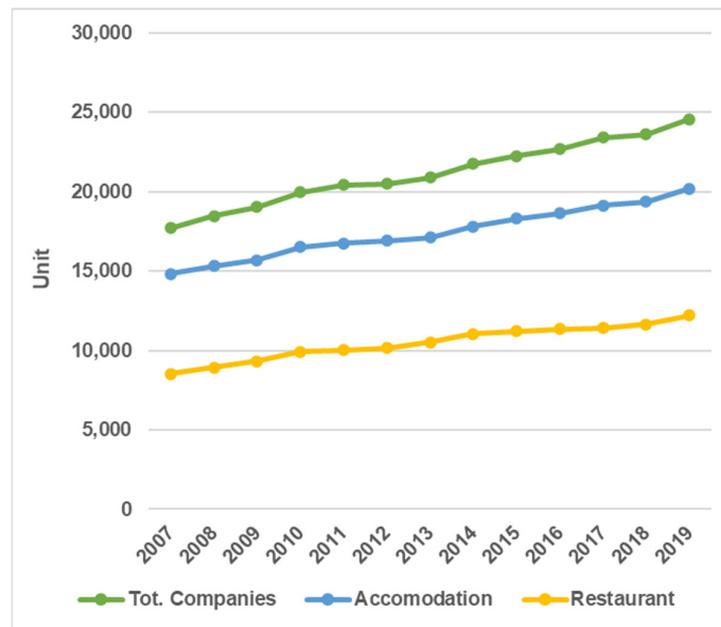


Figure 2. Development of Italian agritourism companies, 2007–2019. Source: authors' elaboration on ISTAT data (ISTAT <http://dati.istat.it/> accessed on 7 November 2021).

Appendix B reports in detail the number of Italian agritourism companies between 2007 and 2019 per the applicable typology.

As shown in Figure 3, Tuscany is the leading Italian region for the incidence of agritourism farms (5369 companies, 21.8% on the total Italian agritourism companies), followed by the autonomous provinces of Trentino-Alto-Adige/South Tyrol (3605 companies, 14.7% on the total Italian agritourism companies, of which 3132 in South Tyrol), with different levels of incidence per activities (i.e., proportionally, the Tuscany region records a higher incidence of catering services compared to South Tyrol, which offers more accommodation facilities).

4.1.1. Public Support: South Tyrol/Alto Adige

South Tyrol (535,829 inhabitants; GRP per capita EUR 47,100) issued the regulation “Holidays on the Farm” based on Provincial Law No. 7. of 19 September, 2008. In accordance with the rural development programmes of the EU and the Italian government, the Autonomous Province of South Tyrol supports “farm holidays” to promote progress in rural areas and the retention of farmers, multifunctionality in agriculture, and the diversification of agricultural incomes in order to promote local products, customs, and rural culture and education for a healthy diet [53]. Farm holiday activities are understood to mean the catering and accommodation of guests by agricultural entrepreneurs and their family members. The people carrying out these activities are considered as “agricultural workers” for the purposes of pension, insurance, and tax treatment [53]. Farm holiday activities include: (1) the lodging of guests in buildings on the farm site; (2) the serving of food and beverages at the farm premises (“Hofschank”), including farm-made wines (in which case it is called “Buschenschank”); (3) the organisation of leisure, educational, sports, hiking, riding and cultural activities; and (4) the organisation of tastings of agricultural products produced on-site and in the surrounding area, as well as catering for people on the basis of agreements with local bodies, with the goal of enhancing the rural area and cultural assets.

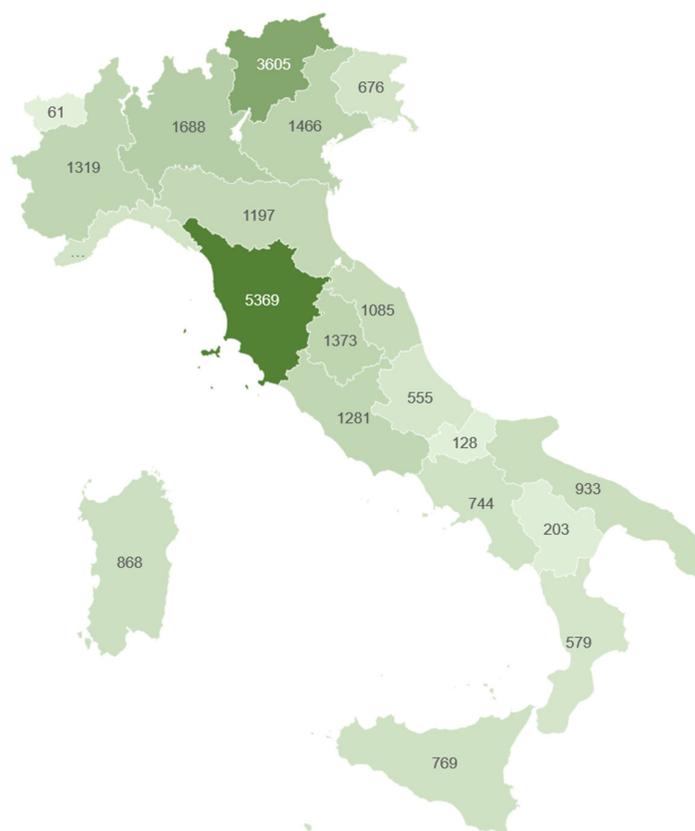


Figure 3. Incidence of Italian agritourism companies per region/province. Source: authors' elaboration on ISTAT data (ISTAT, <http://dati.istat.it/> accessed on 7 November 2021).

According to Article 2(5) of the Law No. 96 of 20 February 2006, the income from farm holiday activities is considered agricultural income for the purpose of recognizing the different qualifications as an agricultural entrepreneur as well as prioritizing the granting of financial contributions [53]. The Provincial Government lays down the criteria for assessing the relationship between farm holiday activities and agricultural activities. The predominance of agricultural activity is measured exclusively by the time required to carry out this activity; the agricultural activity must in any case predominate over the farm holiday activity. In general, agricultural activity is considered as predominant if accommodation and restaurant activities do not exceed ten beds or ten seats respectively [54].

Provincial subsidies for agritourism primarily support new construction, conversions, and renovations of farm buildings. The extent of the subsidy is up to 50% of the eligible costs for grassland farms and 30% for farms with fruit growing, viticulture, or special crops, depending on their natural hardship classification [54]. Financial contributions are only available in the accommodation sector for the new construction of the first two holiday flats or the first four guest rooms. Existing establishments with a local accommodation quality classification of 1 or 2 flowers (out of 5 possible flowers) and new agritourism starters must have successfully completed an appropriate training course on agritourism or a technical college course in agriculture or home economics and nutrition of at least three years at the time of the final payment of the aid at latest [53]. Financial contributions are paid for a maximum amount of eligible expenditure over a ten-year period per farm of EUR 80,000, plus EUR 10,000 if the classification is increased to at least 3 flowers (or to 4 flowers if starting with a 3-flower classification), plus another EUR 5000 if a farm participates in a quality brand scheme (e.g., the “Red Rooster” scheme of the South Tyrolean Farmer Association). Eligibility for accessing subsidies is connected to the agricultural activity prevailing over farm holidays considering the working time. Finally, no other tourism activity may be carried out within the nuclear family (Provincial Law, 2008). Additional

subsidy access conditions specify a minimum investment of EUR 10,000 in order to receive financial contributions. Finally, the newly established agritourism activity must achieve at least 3 flowers after the completion of the works [55]. The supervision of compliance with the provisions of the public regulation is the responsibility of the municipality where the farm is located.

In summary, in South Tyrol there has been substantial public support for the development of agritourism during recent decades. For instance, in 2019, 62 agritourism farms received a total of EUR 1.8 million in public subsidies (for the construction, renovation, and/or furnishing of guest rooms), equivalent to an average of EUR 29,000 per supported farm [56]. This proves the strong growth of agritourism activities during the last few years. As Figure 4 shows, in 2020 there were about 2.1 million overnight stays on farms, which accounted for almost 10% of all overnight stays in the province, up from 0.6 million, or about 3% of all overnight stays, in 1997.

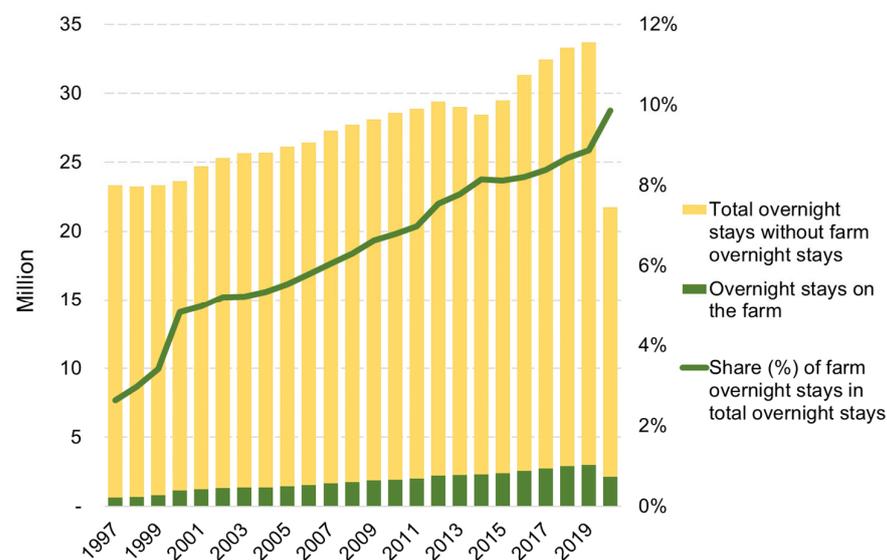


Figure 4. Farm overnight stays in South Tyrol, 1997–2020. Source: authors' elaboration on ASTAT regional statistical data (https://astat.provincia.bz.it/it/news-pubblicazioni-info.asp?news_action=4&news_article_id=667485 accessed on 7 November 2021).

4.1.2. Private Support: Red Rooster

Originally, the development of the agritourism phenomenon in Italy was linked to association activities dating to the mid-1960s, when a group of farmers involved in the General Confederation of Italian Agriculture founded the National Association for Agriculture and Tourism, inspired by the French experience and activities of the Agriculture and Tourism association, then running for about ten years.

In 1998 the *Red Rooster* label was established by the Farmers' Union of South Tyrol for farms offering Farm Holidays. The aim of its foundation was to support local farmers by creating extra income from the farm through products and services with high quality standards guaranteed via strict quality criteria and controls (<https://www.redrooster.it/en/> accessed on 7 November 2021). As a private support scheme, *Red Rooster* currently records 1600 associates (approximately half of the number of agritourism operators in South Tyrol) who can benefit from professional marketing support, promotional activities, and a well-designed booking portal.

4.2. Public Support: USA

In the USA, policies and regulations regarding agritourism are typically enacted at the state, country, or local levels rather than at the national level. As of April 2021, 39 of the 50 states in the USA had enacted agritourism laws of one type or another. Most of these laws fall into one of three categories: civil liability, agriculture, or land use and zoning. Civil

2. Direct sales: how much was gained for the food produced and sold directly to consumers, including only agricultural edible goods,

Although the questions above do not adequately capture agritourism as understood in the academic literature and practical applications (for several reasons), the NASS Census of Agriculture is the best source of national data on agritourism collected from the producer side. The 2017 census indicated that 130,056 farms reported selling USD 2.8 billion of food directly to consumers, and 28,575 farms provided “agri-tourism and recreational services” bringing in USD 949 million. Because of the way in which these data are collected through the census, the numbers of farms cannot be added together due to the risk of double-counting; however, the dollar amounts can be combined. Thus, the total income in 2017 from agritourism including direct sales was USD 3.8 billion, with direct sales accounting for 75% of the income. This is a relatively small percentage of farms and ranches throughout the USA, with only 6.4 percent engaged in direct sales of food as defined by the NASS Census of Agriculture. Examining trends over time, “agri-tourism and recreational services” income increased by 67% between 2007 and 2017, from USD 567 to 949 million in nominal dollars. Although the number of farms increased by 22 percent from 2007, these represent less than 1.5% of all farms in the USA. As the question about direct sales was changed in 2017 to include value-added products, trends over time for direct sales cannot be examined (USDA NASS Census of Agriculture).

4.2.1. Public Support: Vermont

While agritourism including direct sales involves a relatively small percentage of the farms nationwide, agritourism has played an important role in the mountainous and rural state of Vermont (643,077 inhabitants; GDP per capita USD 48,855), located in the Northeastern region of the USA, for more than thirty years.

Regarding agritourism policy in Vermont, legislation specific to agritourism has been passed relatively recently. Act 143, “An act relating to municipal regulation of accessory on-farm businesses”, was enacted 1 July 2018 [57]. The intention of Act 143 is to create a minimal level of support for agritourism enterprises throughout the state, allowing farms to diversify services and revenue streams while increasing their ability to market agricultural products and agricultural experiences by welcoming the public to their farms, overriding local land use regulations that may prohibit such companies in rural areas.

In order to address the concerns of farmers related to liability for visitors and events, Act 31, “An act relating to limiting liability for agritourism”, was enacted 1 July 2021 [58]. Act 31 establishes a limitation on liability for agritourism hosts. The Act recognizes that while participating in agritourism activities carries “inherent risks”, those risks are accepted by adequately informed customers. With the passage of Act 31, Vermont joined seventeen states that already had limited liability agritourism statutes on their books [26].

According to the USDA’s National Agricultural Statistics Service (NASS), the value of agritourism in Vermont grew by 86% from 2000 to 2002. Agritourism brought in USD 19.5 million to the Vermont economy in 2002, and one-third of all farms in the state profited from it. According to the data, small farms were more likely than large farms to be involved in agritourism. The most common sources of agritourism revenue were goods produced and sold on the farm site, such as maple syrup and maple items, fruits, vegetables, and cheese among edible products and Christmas trees, cut flowers, and nursery products among non-edible products. In part because of Vermont’s focus on the importance of agritourism as a diversification strategy for farms, the USDA NASS conducts a Census of Agriculture every five years and, from the beginning of 2007, has added questions including “agri-tourism” topics. According to the NASS Census of Agriculture in 2017, 26.9% of farms in Vermont (1833 farms) sold USD 49.9 million of agricultural products for human consumption directly to consumers. An additional USD 1.7 million from “agri-tourism and recreational services” provided income to 186 farms. Combined, this brought the state of Vermont USD 52 million in 2017. According to the USDA NASS Census, the percentage of direct sales is much higher (97%) than the percentage of “agri-tourism” (3%).

Referring to the online survey of farms and ranches with agritourism and on-farm direct sales that took place in 2019, responses were received from 222 farms in Vermont [27]. Comparing Vermont responses to the full sample of responses from the USA regarding challenges for agritourism operators, 72% of Vermont respondents (versus 81% of all respondents) identified concerns about agritourism liability issues as a challenge, and 75% of Vermont respondents (versus 80% of all respondents) felt that the cost/availability of liability insurance was a challenge. State and local regulations were reported to be a challenge by 68% of Vermont respondents (compared with 72% of all respondents), and 46% of Vermont respondents expressed concern about city/county zoning and permitting (compared with 54% of all respondents). This reduced level of concern in Vermont may reflect the perception of a relatively supportive environment for agritourism as compared to other states around the USA.

4.2.2. Private Support: Vermont Farms! Association and Vermont Fresh Network

The Vermont Farms! Association (VF!A) was founded in 1998 with assistance from University of Vermont Extension and a grant from the United States Department of Agriculture with the aim of representing farms open to visitors. The organization's mission was to develop, promote, and maintain high agritourism standards in Vermont. Membership included different types of producers such as dairy operations, maple sugarhouses, fruit and vegetable growers, apple orchards, sheep farms, vineyards, and Christmas tree operations. The *Vermont Farms! Association* has subsequently merged with the *Vermont Fresh Network*, a non-profit organization devoted to a thriving local food system for the benefit of the environment, communities, health and general vitality of the rural economy (<https://www.vermontfresh.net/> accessed on 7 November 2021). The Vermont Fresh Network partners with several agencies and organisations through the Vermont Agritourism Collaborative and the Farm to Plate Agritourism Community of Practice to deliver technical assistance and support for agritourism operators and their communities.

4.3. South Africa

4.3.1. General Political Framework

In South Africa, agritourism is a relatively new concept. While the history of agritourism in the country is vague, researchers refer to the first agritourism activities as the ostrich farms in Oudtshoorn in the southern Cape and game farms where farmers added game (wildlife) to their normal farming activities for the main purpose of hunting. Both became popular around the 1960s, while 1971 marks the establishment of the first Western Cape wine route in Stellenbosch [28,59]. The Cape wine route has grown from three farms with a small number of tourists to over 300 farms with up to 500,000 visitors per year. Restaurants, wine tasting, picnicking, farm/cellar tours, and selling farm products directly to the public are among of the popular agritourism activities offered on these wine farms. Although it is unclear when farm stay services were first offered in the country, is now by far the most widely offered agritourism activity in the country, and is ideal for travellers who want to enjoy the quiet and tranquillity of rural areas. Agritourism was viewed as a significant component of the agricultural economy by 52.5% of farmers in the southern Cape Garden Route according to a recent poll. It was discovered that tourism activities contributed up to 30% of overall income for 60% of farming businesses [35]. Based on 557 farmers across South Africa that participated in a 2019 study, the average growth rate of agritourism is estimated at 8% from 2010 to 2019 [59].

In 2018, the tourist sector contributed ZAR (South African Rand) 130.1 billion to GDP, accounting for roughly 3% of total GDP (Department of Statistics South Africa, April 2021). In 2018, the tourism industry employed roughly 4.5% of the entire workforce in South Africa. The tourism sector is subject to the jurisdiction and direct responsibility of all three levels of government (national, provincial, and local). The overarching framework guiding tourism development is the National Tourism Sector Strategy, which was updated in 2016 and adopted in 2017 as a ten-year strategy that will last through 2026. It is built

on the following pillars: effective marketing, destination management, supporting ease of access, guest experience, and broad-based advantages [60]. Agritourism activities are neither included nor supported by the national tourism development strategies. The direct contribution of wine tourism to South Africa's GDP was ZAR 2.4 billion in 2019, in addition to 5809 permanent employees and 4414 casual employees during peak season. While wine tourism remains a prominent segment of agritourism, many South African wine farms have expanded their tourist product offerings by developing novel services that enable them to compete [33]. Hunting tourism (trophy hunting) contributes to roughly ZAR 3.8 billion per annum to the country's economy, and creates more than 17,000 job opportunities, playing an important role in the country's rural tourism sector [35].

4.3.2. Policy Priorities and Industry Outlook

As mentioned, in South Africa there are currently no agritourism development policies except for general tourism policies. Agritourism as an initiative falls within two governmental departments: the Department of Agriculture, Land Reform, and Rural Development and the Department of Tourism, while the farm-based hunting tourism activities fall under a third department, the Department of Forestry, Fisheries, and the Environment, which addresses conservation issues. South Africa has nine Provinces (States), and each Province has its own provincial Departments, resulting in farmers having to consider both national and provincial policies. Agritourism is therefore unlikely to receive a National Framework for agritourism development in the short term. A provincial approach is more likely; however, the Rural Development Framework is linked to Rural Land Reform Policies. The latter is the focus of government at this stage.

When considering specific (wildlife-based) agritourism activities, each province has their own support system. For example, in the Western Cape, CapeNature is a government organisation that assists farmers in managing and protecting wildlife, even in a tourism setting. Policies include a list of requirements the farmer needs to meet before receiving a permit to keep certain wildlife on their farm, including the size and type of enclosures. CapeNature provides guidelines as to wildlife encounters, for example, how long an animal can be displayed to the public for and how long they need to rest. Hunting permits can be obtained from this organisation as well. Because South Africa has a large hunting sector, Hunting SA, a national organisation, is involved in providing guidelines to farmers with privately-owned game farms [35].

Similar to wildlife-based activities, other agritourism activities are guided by various organisations. This includes the wine sector (Wine and Agricultural Ethical Trade Association, Shiraz SA, Wines of South Africa, and Vinpro), bird watching (Birdlife South Africa), accommodation (Tourism Grading Council of South Africa), and restaurants (Restaurant Association of South Africa, Liquor Board). While there are guidelines and support available for certain types of agritourism activities, there are no national policies or support focusing on the agritourism sector as a whole.

South African commercial farmers do not receive any governmental subsidies; agricultural production is market-driven, and therefore commercially sustainable. However, developmental initiatives do exist to address imbalances in land ownership from an agricultural perspective. This does not include tourism initiatives on agricultural land. Agritourism in South Africa is seen as a means for farmers to earn additional income, although the primary focus remains on income generated through sales of agricultural produce, particularly following the COVID-19 pandemic. In addition, South Africa has Government Gazetted Regulations concerning the development of agricultural land, which is recognised as a means of food security. According to both experts and private initiatives contributing to the development of agritourism businesses in South Africa, future agritourism policy support measures should be built on the following pillars:

- BBB-EE (Broad-Based Black Economic Empowerment) should be combined with Tourism Skills Development programs to empower those the BBB-EE policy is supposed to benefit.

- Facilitating “Ease of Access” as a collaborative effort between the Department of Home Affairs and the Department of Tourism turning the visa issuing system to become more ‘online-friendly’
- Destination management programs focusing on increasing intra-Africa connectivity and domestic tourism marketing campaigns.

4.3.3. Private Support: Rural Tourism Africa

South African farmers have recently embraced agritourism as a means of both diversifying risk and gaining additional revenue, as well as of creating a forum for farmers and fellow South Africans to communicate. The association *Rural Tourism Africa* serves as a link between potential tourists and other agritourism stakeholders. It acts as a resource centre, presenting tourism opportunities on farms across Africa and allowing local and international tourists to include farm visits in their trip itineraries. This organization offers advice and counselling to its members as well as marketing and promotion assistance and representation of agritourism at the levels of government, tourism, and organized agricultural institutions. Rural Tourism Africa was founded to promote sustainable rural development in South Africa and Africa by facilitating the coordination and implementation of agritourism campaigns by farmers and rural communities. Its key goals are as follows:

- Providing farmers and rural communities with the tools they need to work together to develop agritourism and agritourism routes.
- Fostering a long-term Agritourism environment through collaboration and communication with key stakeholders in the corporate world, tourism organizations, and government.
- Promoting agritourism to domestic and foreign visitors in order to help the rural economy.
- Developing relevant and accessible agritourism intelligence to help sustain a viable network of agritourism participants (<https://www.ruraltourismafrica.com/> accessed on 7 November 2021).

5. Discussion and Conclusions

Our comparison of the three cases examined in this paper shows that the agritourism sector is organized very differently in these geographic locations. It is characterized by a heterogeneous public governance support structure with a large variety of policies and regulations issued (or lacking) by institutions and bodies on national as well as on regional levels. Considering the diverging framework conditions, uneven introduction, and heterogeneous development levels, this is not surprising. What is surprising is that the different approaches have all succeeded in fostering and promoting agritourism in their respective geographies. In all three cases, there seems to be a strong correlation between the variety and dimension of public support and the positive development and high intensity of agritourism. Table 2 presents a synthesis of the results of the comparison.

Countries such as Italy are home to a well-developed agritourism sector based on a well-structured public support system. In this case, the agritourism sector benefits from specific public schemes and laws for its successful development. However, the Italian case demonstrates that associations can lead the development of a regulatory system, meaning that top-down governmental actions follow farmers’ bottom-up initiatives. Indeed, although the South Tyrolean agritourism sector benefits from various support schemes, the professional work of the Red Rooster marketing and promotion association must be recognized as a relevant success factor for agritourism development in the province.

In the same vein, the case of agritourism in South Africa demonstrates that associations for promoting agritourism can be particularly important where specific policies and public support for agritourism do not exist. While there are limited government and non-government supports for specific agritourism activities, agritourism is not yet a standardised or regulated sector in South Africa, and collaboration between various stakeholders is limited or non-existent. Thus, marketing associations play a key role in the promotion of agritourism, in particular when public support is lacking. South Africa

Tourism is an excellent example of such an association; however, the importance and size of agritourism as a critical sector within the tourism industry must first be realised in order to assist with marketing and development. Because agritourism support and resources are not evenly distributed along the nine provinces of the country, a strong and committed organization operating on a national level may achieve much and balance the lack of political and financial engagement by public stakeholders. All in all, the agritourism sector in South Africa would certainly benefit in the future from a basic legal framework that guarantees a standardised agritourism experience that can compete with agritourism in other areas of the world.

Table 2. Summary of agritourism regulations, supports, and trends in the case studies.

	Italy— South Tyrol	USA— Vermont	South Africa
Definition of the sector and the activities admitted	Yes	Yes (≠by state)	Unofficial
Existence of agritourism policies/regulations (national level)	Yes	None	None
Existence of agritourism policies/regulations (regional level)	Yes	Yes	None
Existence of agritourism private sector support activities (national level)	Yes	Yes	Yes
Existence of agritourism private sector support activities (regional level)	Yes	Yes	None
Public subsidies for agritourism development/maintenance	≈2M €/year	NA	None
Agritourism growth rate	+22% (2010–2019)	+67% (2007–2017)	+8% * (2010–2019)

* estimate based on [59].

As for the USA, many challenges remain both in Vermont and throughout the nation regarding policy and regulations. Indeed, the lack of consistent regulations around the USA creates an uneven playing field, where farms in certain states may perceive a more supportive environment and other farms may feel especially burdened by regulations. Agritourism has demonstrated great potential throughout the USA as a diversification strategy for working farms and ranches that can simultaneously promote agricultural education among the non-farming public, offering improved access to fresh local products in remote places and economic opportunities in rural communities. However, farms and ranches need assistance with navigating existing regulations, and the lack of consistency in policy and regulations throughout the USA creates barriers, confusion, and unevenness in the support systems available for agricultural enterprises. Private sector support on both the national and regional levels has played an important role in agritourism development along with university research and outreach through the Cooperative Extension System.

Finally, the comparison of these three cases shows that the countries are in different life cycle stages of agritourism development. South Africa is at the start, without any legislation; Italy is towards the end of the life cycle, with heavy regulations to control excesses (e.g., farm resorts) or subsidy misuse; and the USA is somewhere in the middle, with regulations and supports enacted in certain states and other states at a different stage.

Taken together, this work represents an exploratory analysis that leaves many questions unanswered and calls for more research. Our preliminary findings suggest that both public and private engagement are important for strengthening agritourism. Further development requires clear criteria and a binding definition in order to protect agritourism and to make it a unique and sustainable farming experience.

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Appendix A

Table A1. Italian norms and regulation applied to agritourism activities (Source: Italian Rural Network, <https://www.reterurale.it/flex/cm/pages/ServeBLOB.php/L/IT/IDPagina/23556>, accessed on 11 October 2021).

	Linked Activities—General rules (15)	Processing/Direct Sale Agricultural Products—Standards of the Sector (30)	Agritourism, Wine Tourism, Fishing Tourism—Standards of the Sector (21)	Agritourism—Standards on Accommodation/ Agricamping (9)	Agritourism—Standards on Catering (8)	Agritourism—Standards on Recreational/Cultural Activities (8)	Social Farming—Standards of the Sector (5)	General Rules—Multisector Standards (16)
Framework law (26)	<ul style="list-style-type: none"> • D.Lgs. (2) • Laws (2) • Decree (1) 	<ul style="list-style-type: none"> • D.Lgs. (3) • Ministerial decree (1) • Resolution (3) • Law (1) • Circular (1) 	<ul style="list-style-type: none"> • Law (3) • Min. decree (4) 			<ul style="list-style-type: none"> • Law (1) 	<ul style="list-style-type: none"> • Law (1) • Min. decree (1) 	<ul style="list-style-type: none"> • Law (2)
Taxation (28)	<ul style="list-style-type: none"> • DPR (6) • Law decree (1) • CR (1) • Law (1) 	<ul style="list-style-type: none"> • Min. decree (1) 	<ul style="list-style-type: none"> • Law (2) • Rep. Pres. Decree (1) • Document (1) • Law decree (2) • Decree (1) • Judgment (1) • Quest/answ(1) 	<ul style="list-style-type: none"> • D.Lgs. (1) • Judgment (1) 	<ul style="list-style-type: none"> • Document (1) 		<ul style="list-style-type: none"> • Rep. Pres. Decree (1) • Resolution (2) 	<ul style="list-style-type: none"> • Decree (1) • D.Lgs. (1) • Rep. Pres. Decree (1)
Empl/Social security (4)	<ul style="list-style-type: none"> • Circular (1) 		<ul style="list-style-type: none"> • Circular (3) 					
Workplace safety (1)			<ul style="list-style-type: none"> • Resolution (1) 					
Food safety (20)		<ul style="list-style-type: none"> • Law (1) • Rep. Pres. Decree (1) • EU Reg (8) • EU Doc (2) • Opinion (1) • Decree (2) 				<ul style="list-style-type: none"> • EU Reg (1) • Note (1) • Law (2) • Circular (1) 		
Quality Products (5)		<ul style="list-style-type: none"> • EU Reg. (2) • Min. decree (2) • Law (1) 						
Public security (9)				<ul style="list-style-type: none"> • Decree (1) • Min. decree (1) 	<ul style="list-style-type: none"> • Law (1) • Decree (1) 			<ul style="list-style-type: none"> • D.Lgs. (3) • Decree (1) • EU reg (1)

Table A1. Cont.

	Linked Activities—General rules (15)	Processing/Direct Sale Agricultural Products—Standards of the Sector (30)	Agritourism, Wine Tourism, Fishing Tourism—Standards of the Sector (21)	Agritourism—Standards on Accommodation/ Agricamping (9)	Agritourism—Standards on Catering (8)	Agritourism—Standards on Recreational/Cultural Activities (8)	Social Farming—Standards of the Sector (5)	General Rules—Multisector Standards (16)
Guest safety (11)				<ul style="list-style-type: none"> • Decree (1) • Min. decree (1) • Trento/Bozen conference (2) 		<ul style="list-style-type: none"> • State/Regions conference (1) • State /Regions Agreement (1) • Security info (1) • Consultation (1) • Min. decree (2) • Law (1) 		
Public health (3)								<ul style="list-style-type: none"> • Law (1) • DPCM (1) • Circular (1)
Other (5)			<ul style="list-style-type: none"> • Law (1) 	<ul style="list-style-type: none"> • Circular (1) 				<ul style="list-style-type: none"> • D.Lgs. (2) • DPR (1)

Appendix B

Table A2. Typologies of Italian agritourism companies *, 2007–2019 (Source, ISTAT, <http://dati.istat.it/> accessed on 7 November 2021).

	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	Δ 2007–2019	
														Absolute Values	% Values
ACCOMODATION															
Tot. companies	14,822	15,334	15,681	16,504	16,759	16,906	17,102	17,793	18,295	18,632	19,115	19,354	20,174	5352	36.1
Tot. beds	179,985	189,013	193,480	206,145	210,747	217,946	224,933	232,580	238,323	245,473	262,659	262,659	285,027	105,042	58.4
Tot. parking	7055	7320	7785	8759	9113	8363	8180	9263	10,660	11,367	11,746	11,529	12,819	5764	81.7
RESTAURANT															
Tot. companies	8516	8928	9335	9914	10,033	10,144	10,514	11,061	11,207	11,329	11,407	11,649	12,209	3693	43.4
Tot. seats	322,145	337,385	365,943	385,470	385,075	397,175	406,957	423,777	432,884	444,117	441,771	462,184	493,319	171,174	53.1
TASTING															
Total companies	3224	3304	3400	3836	3876	3449	3588	3837	4285	4654	4849	5199	5959	2735	84.8
OTHER ACTIVITIES															
Tot. companies offering:	9715	10,354	10,583	11,421	11,785	11,982	12,096	12,307	12,416	12,446	12,986	12,873	12,570	2855	29.4
- Horse riding	1559	1615	1548	1638	1662	1489	1230	1222	1269	1357	1496	1424	1412	-147	-9.4
- Hiking	2879	3140	3071	3190	3233	3324	3124	3143	3242	3442	3482	3447	3115	236	8.2
- Nature observations	558	607	623	784	891	932	972	1037	1110	1317	1240	1284	1481	923	165.4
- Trekking	1629	1657	1674	1950	1949	1821	1717	1767	1838	1939	1932	1897	1608	-21	-1.3
- Mountain bike	2347	2398	2309	2800	2794	2785	2851	2656	2666	2585	2595	2439	1623	-724	-30.8
- Educational farm	-	-	-	752	1122	1251	1176	1289	1402	1497	1547	1516	1715	-	-
- Courses	1256	1407	974	1967	1878	2009	1770	1887	1952	1917	1855	2017	1747	491	39.1
- Sport	3758	4203	4168	4152	4141	5058	5088	5013	4846	4752	5000	4780	3597	-161	-4.3
- Other	5395	5616	5994	6312	6737	4917	6033	6391	6443	6704	7411	7501	8641	3246	60.2
Total	17,720	18,480	19,019	19,973	20,413	20,474	20,897	21,744	22,238	22,661	23,406	23,615	24,576	6856	38.7

* A farm could be authorised to carry out one or more types of agritourism activities.

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