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#AGRI&TOUR - Boosting Agritourism with Youth Power

MARKET RESEARCH ON AGRITOURISM



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INTRODUCTION

Introduction

Introduction

The Global Agritourism Network (<https://globalagritourismnetwork.org>) defines agritourism as “an agricultural diversification activity resulting from the synergistic intersection of tourism and agriculture, offering authentic experiences tied to agricultural production that showcase regional tangible and intangible resources”. That consensus text that defines, at a global level, an activity with several nuances but one clear certainty: farming is the key factor, which sets it apart from other tourism sectors or market niches.

In the specialized academic literature, we find different terms used to define the topic, such as agrotourism, agri-tourism, agroecotourism, farm tourism, vacation farm, tourism on farms, etc. Those are different words for the same concept, sometimes with minor differences among them. Confusion grows when we consider activities such as food tourism, wine tourism, olive oil tourism, ecotourism, green tourism, or rural tourism, which frequently overlap in the same place. Thus, boundaries among them are sometimes blurred.

Sourav Rauniyar *et. al* (2021) analysed bibliographic data of 459 research publications regarding agritourism. The results show that “agritourism is broadly conceptualised as an amalgamation of agricultural resources, activities, and traditions with fun and educational purposes, which is served as a tourism product and ultimately augment farmers’ income. Such dissimilar theorization of agritourism by the researchers makes a systematic literature review of agritourism remarkably necessary and also conceptually challenging task”.

The conceptual work in the field of agritourism started in the 1980’s. After about forty years, the concept of rural tourism acts as an umbrella for tourist modalities which have a common setting (the rural environment, as opposed to the city), but show different characteristics both in terms of tourist supply and demand, which leads to the existence of several tourism segments or market niches.

Defining agrotourism is not an easy task when a global definition is needed. Moreover, there is not a unique approach to the concept of agritourism since the meaning shows some differences among territories. Thus, what is legally defined as agrotourism in some places may not be considered as such in a different territory (even in the same country!). There are several elements involved which bring many nuances to the table. The geographical, historical, legal, and cultural contexts are fundamental and, in the end, differential. However, there is a clear central element: the close link between agrotourism, farms, the rural environment, and the rural heritage.

Therefore, within the framework of this report and the #AGRI&TOUR project, we will consider agrotourism as a that modality (or niche market) of rural tourism which is developed as an income complement to agrarian production and in which the main motivation for tourists is the practice of activities linked to farming professions and the agrarian lifestyle (this is the distinguishing element), especially when done together with the farmers.

To carry out market research in each country (Romania, Spain, Ireland and Italy), the partners of the #AGRI&TOUR project contacted several stakeholders and experts to gather information: national and regional governments, rural development bodies, universities, agriculture schools and research centres, farmer's associations, agri-food cooperatives, agriculture advisors and professors, farmers, other experts and consultants, etc. As a result, they provide an overview of the current agritourism market and its evolution in their countries.

The topics included in these documents include demand analysis (sociodemographic profile of the tourist, motivations and expectations, consumption and spending behaviour, and satisfaction and loyalty level), supply analysis (types of agricultural holdings and services; capacity, prices, and seasonality; marketing channels; and professionalisation and digitalisation), environment and market analysis (PESTEL analysis, competitors analysis; and entry barriers and opportunities), sustainability and impact (local economic, social, cultural, environmental impact and alignment with rural development policies), trends and future scenarios (innovation in agritourism, new demand segments, potential growth scenarios), and some conclusions and recommendations. The Italian report follows a different approach since it is an extra document not considered in the project's application form.

Please visit <https://www.agritourproject.eu> for further information both on the project and the market research.

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MARKET RESEARCH ON AGRITOURISM IN ROMANIA



TUS



Associazione
Sviluppo Rurale

Introduction

Rural tourism and agritourism occupy a distinctive and growing position within the European and global tourism landscape. As urbanisation accelerates and the lived experience of agricultural life recedes from the memory of city-dwelling populations, the rural world acquires a new value as a space for rest, cultural reconnection, and authentic experience. Romania, with its extraordinary combination of natural landscapes, living folk traditions, diverse agricultural heritage, and relatively well-preserved rural communities, is exceptionally endowed to develop a competitive agritourism sector. Yet the gap between this natural endowment and the sector's current commercial performance remains substantial, and understanding this gap is the central analytical challenge addressed by this report.

Agritourism in Romania is not a recent phenomenon. Informal lodging with village households has been practiced since the interwar period, when urban residents from Bucharest and other major cities first began travelling to mountain and rural destinations for summer recuperation. The formalization of this practice into a recognized tourism category accelerated after 1990, supported by successive European rural development funding programs and an institutional framework that has progressively defined, classified, and regulated agritourism guesthouses as a distinct accommodation type. Today, Romania's agritourism sector comprises over 3,600 registered guesthouses, more than 61,000 bed places, and historically generates over one million tourist arrivals annually — making it the single largest accommodation category in the national tourism statistics by number of units.

The purpose of this market research report is to provide a systematic, evidence-based analysis of the Romanian agritourism sector as it stands in 2025–2026, drawing on national statistical data, peer-reviewed academic literature, sectoral studies, and policy documents. The report examines demand and supply dynamics, the macro-environmental context, the sustainability and socioeconomic impact of the sector, and the trends and scenarios that will define its trajectory over the coming decade. On the basis of this analysis, it formulates concrete strategic recommendations for operators, industry associations, and public authorities aiming to strengthen Romanian agritourism's competitiveness, inclusivity, and long-term resilience.

In Romania, from the perspective of the typology of tourist accommodation establishments, the specific unit for rural areas is the **agritourism guesthouse**. Their classification is carried out using daisies (from 1 to 5 daisies), but for ease of comparison between countries, we will use the star classification system (1–5*). National legislation defines the **agritourism guesthouse** as “*a tourist accommodation structure with a capacity of up to 8 rooms, operating in citizens' homes or in an independent building, which provides tourists with accommodation in specially arranged spaces, facilities for meal preparation and serving, as well as the possibility of participating in household or handicraft activities.*”

Furthermore, in agritourism guesthouses, tourists are offered meals prepared mainly from natural products originating from the hosts' own household (including fish products) or from authorized local producers/fishermen. The hosts are directly responsible for welcoming tourists and organizing their activities throughout their stay at the guesthouse, and they accompany tourists who participate in traditional, household, or handicraft activities.

From the perspective of leisure activities, agritourism guesthouses carry out at least one activity related to agriculture, fish farming, fishing tourism, reed harvesting, animal breeding, cultivation of various types of plants, fruit orchards, or handicraft activities involving a workshop where various handicraft products are made. Within the territory of the Danube Delta Biosphere

Reserve, traditional activities include, but are not limited to, boat trips on the lakes and channels of the Danube Delta, traditional fishing (setting fishing gear and harvesting fish), or recreational fishing. These activities must be carried out continuously or according to their specific nature and seasonality and must have a repetitive character. (Order no. 65, 2013)

Over half of the nation's 3,668 agritouristic properties are crammed into just a handful of counties (Braşov, Maramureş, Suceava, Tulcea, Harghita, Cluj, Bihor). This creates hyper-competition in these areas, leaving the entire flatland periphery of southern and eastern Romania completely disconnected from rural tourism revenues.

Demand Analysis

Understanding the demand side of agritourism in Romania requires a combined reading of official statistical data, academic research, and sectoral studies. While national tourism statistics provide quantitative benchmarks regarding arrivals, overnight stays, and occupancy rates, peer-reviewed studies and sectoral surveys offer essential insight into the qualitative dimensions of tourist behaviour — who visits, why, how much they spend, and whether they return. Together, these sources help construct a comprehensive profile of the Romanian agritourist and identify the main characteristics shaping demand in the sector (Oltean and Gabor, 2022; Popescu et al., 2023).

Agritourism represents a vital pillar of Romanian tourism, consistently attracting over 1.1 million visitors annually and accounting for approximately 10% of total registered tourist arrivals. However, recent statistical data reveal increasing structural vulnerability within the sector. In 2025, while overall Romanian tourism declined moderately by 2.1% compared to the previous year, agritourism recorded a significantly sharper contraction of 10.9%, losing nearly 145,000 tourists in a single year. The total number of arrivals in agritourism establishments reached 1.09 million tourists in 2025, generating approximately 2.1 million overnight stays and an average length of stay (ALS) of 1.92 nights. Seasonal concentration is equally pronounced: August registered the peak ALS of 2.05 nights, closely followed by July at 2.03 nights, confirming that agritourism demand in Romania remains mathematically locked into a rigid weekend-break and summer-holiday pattern.

Yearly statistical data confirm that agritourism is highly dependent on domestic middle-income families taking optional secondary vacations. When inflation and economic pressures reduced consumer purchasing power in 2025, tourists tended to protect their primary vacations — longer spa or coastal trips, which maintained the national ALS stable at 2.1 nights — while entirely cutting out the optional, short-stay rural weekend trips that constitute the backbone of agritourism demand. The structural fragility of this dependency is further underscored by the limited internationalisation of the sector: in 2025, foreign tourists accounted for only 6.4% of agritourism demand, compared to 18.4% across Romanian tourism as a whole. Nevertheless, foreign visitors retain considerable economic relevance, being disproportionately concentrated in premium accommodation categories and exhibiting a particular preference for 4 and 5-daisy properties in internationally recognised destinations such as Maramureş, Bucovina, and the Danube Delta. Notably, even during the sector-wide crash of 2025, premium 5-daisy establishments grew, and foreign arrivals to premium units increased by 51.7% (from 2,614 to 3,967), underscoring the resilience and growth potential of the high-end international segment.

Sociodemographic Profile of the Tourist

The Romanian agritourism market is dominated overwhelmingly by domestic tourists. Data from the National Institute of Statistics (INS) confirm that internal tourists consistently account for more than 93% of all arrivals in agritourism guesthouses throughout the 2021–2025 period — a proportion substantially higher than the national average for all accommodation types, where domestic guests represented approximately 81.6% of arrivals in 2025. This strong domestic orientation reflects both the cultural proximity of urban Romanian residents to rural traditions and the relative underdevelopment of international marketing for this segment (Nistoreanu et al., 2003).

Research conducted in the major agritourism destinations — the Moeciu-Bran area in Braşov County, the Bucovina corridor (Suceava), the Maramureş region, and the Apuseni Mountains — reveals a relatively consistent sociodemographic profile. The typical agritourist is an urban resident aged between 30 and 55, travelling either as a couple or as part of a family with children. Most visitors originate from Romania's large urban centres — Bucharest, Cluj-Napoca, Iaşi, Braşov, and Timişoara — and generally display medium to high educational attainment and middle or upper-middle income levels (Ciolac et al., 2019; Dorobantu and Nistoreanu, 2012). This is consistent with the proximity tourism model documented for other Central and Eastern European rural destinations: the majority of visits are short-radius getaways from metropolitan areas, typically not exceeding 200 kilometres from the place of residence.

Families with children represent the largest tourist segment in Romanian agritourism. For many urban households, rural tourism provides an opportunity to reconnect children with nature, traditional lifestyles, and agricultural practices that are increasingly absent from urban environments, reflecting a broader cultural anxiety about children's disconnection from food production and agricultural heritage (Chivu and Stanciu, 2024a; Ciolac et al., 2019). Couples travelling without children, especially those aged over 40, form the second-largest segment and are primarily motivated by relaxation, gastronomy, and landscape appreciation. In recent years, younger urban professionals aged between 25 and 35 have also emerged as an increasingly visible segment, using agritourism guesthouses as affordable and authentic short-break alternatives to conventional hotel accommodation (Poruţiu et al., 2024).

Important differences in tourist behaviour can be observed across demographic groups. Younger visitors are generally more interested in adventure tourism, experiential activities, and visually distinctive destinations suitable for social media sharing. Older tourists, by contrast, show stronger preferences for cultural heritage, authenticity, and traditional rural experiences — a tendency particularly visible in ethnographically rich regions such as Maramureş and Bucovina, where the preservation of pre-communist agricultural traditions, wooden architecture, folk costumes, and artisan textile production constitutes a primary draw (Dorobantu and Nistoreanu, 2012; Stanciu et al., 2024). Gender-related differences have also been identified in the literature, with women generally showing greater sensitivity toward accommodation quality, gastronomy, and cleanliness standards (Dobre et al., 2024).

The geographic origin of tourists creates a clear territorial hierarchy of demand. Bucharest and the Ilfov metropolitan area generate the highest absolute number of agritourism visitors, owing to the combination of population size, purchasing power, and proximity to the Carpathian foothills. Cluj-Napoca exerts a similarly strong gravitational pull toward Maramureş and the

Apuseni Mountains. Among foreign agritourists, demand is disproportionately concentrated in the premium segment and in destinations with an internationally recognised cultural or ecological identity. The most represented source markets include Germany, France, the Netherlands, Israel, and the United Kingdom, reflecting both direct cultural affinities and diaspora-related travel patterns (Nistoreanu et al., 2003; Oltean and Gabor, 2022).

Motivations and Expectations

The motivational structure of Romanian agritourists has been the subject of a growing body of research since the early 2000s, when the sector first emerged as a distinct academic object of study. Across multiple empirical investigations, a consistent cluster of motivations emerges: the desire to escape urban stress and reconnect with nature, the search for authentic traditional food and rural gastronomy, the wish to engage with local cultural heritage and customs, and a specific interest in showing children the agricultural way of life (Nistoreanu et al., 2003; Galluzzo, 2020; Stanciu et al., 2023). These motivations are closely interrelated and reflect a broader post-industrial urban nostalgia for a rural past that many Romanian city-dwellers still have within living memory through grandparents or childhood visits to the countryside. Romanian agritourism demand thus aligns closely with broader European trends associated with slow tourism, experiential tourism, and sustainability-oriented travel (Popescu et al., 2023; Velea et al., 2024).

Research by (Adamov et al., 2020), based on surveys of rural tourists across multiple Romanian regions, demonstrated that "disconnection from urban routine" and "contact with nature" are the dominant primary motivations, while "tasting traditional food" and "participating in local traditions" ranked second and third respectively. Traditional food prepared from locally sourced ingredients consistently emerges as one of the most appreciated components of the agritourism experience: in many cases, tourists consider home-cooked meals and direct interaction with local culinary traditions more memorable than the accommodation itself (Popescu, 2016). Products originating directly from the host household — including cheese, honey, preserves, smoked meats, and homemade beverages — contribute significantly to the authenticity of the experience and reinforce the connection between tourism and local agricultural production (Bondac et al., 2025). This places Romanian agritourism demand firmly within the experiential and slow-tourism paradigm, with one distinctive local feature: the personal relationship between visitor and host remains a primary differentiating factor, something difficult to replicate through more standardised rural accommodation models.

Another important motivational dimension is the search for authenticity and cultural heritage. Visitors are increasingly interested in experiencing traditional architecture, local customs, handicrafts, folk traditions, and rural lifestyles perceived as increasingly rare in contemporary urban society (Bacter et al., 2025). This tendency is particularly visible in Maramureş, Bucovina, and the Apuseni Mountains, where tourism products are strongly connected to regional identity and ethnographic heritage (Dorobantu and Nistoreanu, 2012).

A significant segmentation of motivations is observed along age and socioeconomic lines. Younger urban visitors — the 25–40 age group — increasingly cite "authenticity" and "uniqueness of the experience" as primary motivators, reflecting the influence of social media-driven tourism behaviour in which agritourism destinations compete for attention through

visual distinctiveness and shareable content. This group also tends to prioritise adventure activities, experiential workshops, wine tourism, and api-tourism experiences (Antonie, 2024; Gurgu and Fîntîneru, 2025). Older visitor segments (50+) show a stronger alignment with heritage and memory-based motivations, favouring emotional connection, cultural continuity, and relaxation over organised activities. This internal segmentation of motivations has direct implications for product design: a single agritourism experience does not satisfy the entire market equally, and successful operators tend to curate their offer around a specific motivational cluster rather than attempting to appeal universally.

In terms of prior expectations, Romanian agritourists consistently place the highest value on the quality and authenticity of the food offer, the personalised hospitality of the host family, the natural setting, and the cleanliness and comfort of the accommodation. Personal interaction with hosts plays a particularly important role in shaping expectations and overall visitor satisfaction (Campón-Cerro et al., 2017). At the same time, tourists increasingly expect higher service standards, reliable digital communication, and accurate online representation of accommodation facilities. Recent research shows that 70% of Romanian tourists use digital tools when planning rural trips, and online visibility directly influences destination choice. However, rural tourism suppliers have implemented digital technology at only a low level, creating a gap between tourist expectations and available services (Istoc, 2025). Digital reviews on platforms such as Booking.com, TripAdvisor, and domestic specialist sites indicate that discrepancies between advertised photographs and actual conditions are among the most cited sources of visitor dissatisfaction, underscoring the importance of accurate and honest digital representation for guesthouse operators. Expectations regarding organised activities — farm tours, craft workshops, horse riding, guided hikes — are present but secondary for most visitors, reflecting the still predominantly accommodation-and-meal centred model of Romanian agritourism relative to more activity-intensive Western European models.

Consumption and Spending Behaviour

The consumption pattern of agritourists in Romania is characterised by short stays concentrated at weekends and during public holidays, with a limited mid-week presence that constitutes one of the sector's principal structural weaknesses. As noted above, the average length of stay in agritourism guesthouses stood at 1.92 nights in 2025, slightly below the 2024 value and notably lower than the national accommodation average. This weekend-break pattern — characteristically arriving Friday evening and departing Sunday afternoon — has been documented consistently since the early research of Nistoreanu (2003) and remains essentially unchanged two decades later, indicating that agritourism in Romania functions primarily as a short-escape valve from urban routine rather than as a primary holiday destination.

Accommodation pricing and tourist spending in Romanian agritourism are shaped by a combination of guesthouse classification, available amenities, and the broader expectations of value and authenticity. Recent research employing hedonic pricing models and large-scale surveys confirms that higher guesthouse classifications—often denoted by the “daisy” system—directly correlate with increased nightly rates, reflecting enhanced service standards, superior facilities, and greater guest capacity. For instance, (Gordan et al., 2024) analyzed data from over 5,000 accommodation units and demonstrated that properties with larger capacities, luxurious

amenities such as pools and saunas, and proximity to natural attractions command significantly higher prices, sometimes nearly doubling rates compared to basic guesthouses. Similar findings are reported by (Gordan et al., 2023), who identified that luxury amenities and rural, less densely populated locations sharply increase the price of accommodation, especially in areas with high natural value.

The guesthouse classification system itself is highlighted as a key determinant of pricing, with higher “daisy” levels reflecting more comprehensive service and justifying premium rates (Cretu et al., 2015). In practice, guesthouses at the lower end of the classification spectrum (2–3 daisies) offer basic yet authentic experiences that attract price-sensitive tourists, while 4–5 daisy establishments provide enhanced comfort and a broader range of services, thus appealing to visitors willing to pay a premium (Dobre et al., 2024; Stanciu et al., 2024). Tourists aged 31–50, in particular, are attentive to the quality/price ratio and are influenced by the authenticity and amenities associated with each daisy level (Dobre et al., 2024).

Price sensitivity remains a critical factor for younger generations, with Gen Z travelers in particular prioritizing value and actively seeking accommodation that balances unique rural experiences with affordability (Porutiu et al., 2021; Tanase et al., 2023). The importance of price is further underscored by evidence from mountain destinations such as Sibiu and Bihor Counties, where a positive perception of the quality-price ratio directly influences repeat visitation and destination loyalty (Herman et al., 2021; Stanciu et al., 2024). While specific nightly spending figures can vary by region and season, it is consistently observed that guests are willing to pay substantially more for enhanced comfort, luxury, and authenticity. The literature demonstrates that the ongoing differentiation in pricing based on guesthouse classification and amenities not only reflects market realities but also aligns with tourists’ evolving expectations for tailored, high-quality rural tourism experiences in Romania. Compared to Western European agritourism destinations, Romanian expenditure levels remain relatively moderate, reflecting both the generally lower price level of the Romanian rural economy and the price sensitivity of the predominantly domestic middle-income visitor base (Poruțiu et al., 2024).

In terms of the structure of on-destination spending, accommodation and food services represent the largest share of tourist expenditure, typically accounting for approximately 60–70% of total spending during the stay. Local product purchases — including artisan foods, traditional crafts, and farm-direct products such as cheese, honey, preserves, and smoked meats — absorb a further 15–20% of total visitor spend, while spending on paid activities and excursions remains low, typically under 10% of the total (Morariu (Rusu) et al., 2025; Stanciu et al., 2025). This spending structure positions local food products as the second most important economic beneficiary of agritourism activity after the accommodation provider itself, and underlines the potential for agritourism to function as a driver of short food supply chains and direct producer-to-consumer commercial circuits. Most recent studies on Romanian agritourism confirm that the majority of food served in guesthouses is sourced either from the guesthouse holding itself or from local producers within the same commune, particularly in mountain regions, thus generating direct economic benefits and supporting local supply chains (Morariu (Rusu) et al., 2025; Stanciu et al., 2025). The expansion of Local Gastronomic Points has further institutionalized this practice, as these establishments rely almost entirely on locally sourced ingredients, amplifying the local economic multiplier effect (Chivu and Stanciu, 2024b). Such

food sourcing practices not only preserve culinary heritage and authenticity but also stimulate rural economies and encourage sustainable development (Dobre et al., 2022).

Satisfaction and Loyalty Levels

Empirical studies confirm that visitor satisfaction in Romanian agritourism is generally high, with post-visit survey data consistently recording scores above 4.0 on 5-point Likert scales (Bacter et al., 2025; Dobre et al., 2024). The main drivers of this satisfaction are the quality of traditional food, the warmth of host hospitality, and the natural environment, all of which receive the highest ratings from guests (Dobre et al., 2024; Popescu et al., 2023). Furthermore, the sector displays strong behavioral loyalty: repeat visitation and guest recommendations are common, especially in destinations perceived as authentic and hospitable (Bacter et al., 2025). These findings position agritourism among the leading segments for visitor satisfaction and loyalty within Romanian tourism (Popescu et al., 2023). Recent international and Romanian agritourism studies consistently identify authenticity and direct human interaction as primary drivers of visitor satisfaction in this segment (Bacter et al., 2025; Choe and Kim, 2018). Traditional meals prepared from local ingredients are often highlighted as the most memorable element of the tourist experience, while the natural environment and cultural authenticity—particularly where traditional architecture and customs are preserved—contribute substantially to positive visitor evaluations (Choe and Kim, 2018; Dobre et al., 2025).

Survey-based research in rural and mountain destinations demonstrates that a significant proportion of guests are repeat visitors, with loyalty rates frequently exceeding 50%, and intention to recommend often surpassing 80%—especially in regions known for authentic experiences and strong host-guest relationships (Bacter et al., 2025; Popescu et al., 2023). These studies also report that personal recommendations and word-of-mouth are the main customer acquisition channels for small and family-run guesthouses, which typically invest minimally in digital marketing (Tanase et al., 2023).

Such findings underscore the strategic importance of guest satisfaction, relational hospitality, and local reputation for business sustainability in Romanian agritourism (Bacter et al., 2025; Popescu et al., 2023).

Despite generally high satisfaction levels, several challenges persist. Infrastructure deficiencies, limited diversification of activities, overcrowding during peak periods, and inconsistencies in service quality can negatively affect visitor experiences (Bacter et al., 2025). Host-guest relationships in Romanian agritourism are widely recognized as the most powerful mechanism driving guest loyalty and repeat visitation. In-depth studies from regions such as Maramures and Bucovina have shown that the intensive, personal interaction between hosts and guests—often including shared meals, informal conversations, and participation in household activities—creates strong emotional bonds that surpass the influence of infrastructure or amenities on revisit intentions (Bacter et al., 2025; Popescu et al., 2023). Empirical research demonstrates that authentic communication, emotional engagement, and personalized service are consistently rated by visitors as the most memorable and valued aspects of their stay (Dobre et al., 2025). As a result, investments in host communication skills and the experiential quality of the stay yield higher returns in terms of guest loyalty than equivalent investments in facilities or infrastructure (Bacter et al., 2025). This relational model sets Romanian agritourism apart from

more standardized hospitality sectors and underscores the strategic importance of fostering genuine host-guest bonds for business sustainability and competitive advantage.

Concluding Remarks

The Romanian agritourism market is shaped by a complex combination of sociodemographic characteristics, motivational factors, spending patterns, and relational experiences. Demand remains strongly domestic and highly dependent on short-duration leisure travel, while authenticity, gastronomy, hospitality, and natural landscapes constitute the primary drivers of tourist satisfaction (Popescu et al., 2023). At the same time, the sector faces important structural challenges related to seasonality, limited internationalisation, infrastructure gaps, and increasing competition within mature destinations.

Nevertheless, Romanian agritourism continues to possess significant development potential, particularly through the integration of sustainability principles, diversification of tourism experiences, expansion of digital marketing channels, strengthening of local cultural identity, and a deliberate pivot toward capturing the growing segment of international visitors who currently enter Romania but bypass the countryside entirely (Gica et al., 2021; Gurgu and Fintineru, 2025). Managing the tension between growth and the preservation of the authenticity values that underpin demand will be among the central governance challenges for Romanian agritourism in the coming decade.

Supply Analysis

The supply of agritourism services in Romania is characterized by a diverse range of agricultural holdings, traditional rural activities, and accommodation structures that reflect the country's rich cultural and natural heritage. This chapter analyzes the main types of farms and services, the characteristics of accommodation capacity and seasonality, as well as the level of marketing, professionalization, and digitalization within the Romanian agritourism sector.

Types of Agricultural Holdings and Services

Agritourism in Romania is mainly based on small family farms where tourism activities are combined with traditional agriculture. According to Romanian legislation, agritourism guesthouses provide accommodation, meals, and opportunities for tourists to participate in agricultural or handicraft activities (Order no. 65/2013).

One of the most common types of agricultural holdings is the mixed farm, which combines crop cultivation and animal breeding. These farms are common in regions such as Maramureș, Bucovina, and Bran-Moieciu. Tourists can take part in activities such as feeding animals, collecting eggs, or preparing traditional food products (Vasiu et al., 2021).

Livestock farms are also important for Romanian agritourism, especially in mountain areas like Brașov and Sibiu counties. These farms attract visitors through traditional shepherd activities, dairy products, and local gastronomy. Cheese tastings and traditional meals are frequently included in tourist services (Vasiu et al., 2021).

Wine-producing farms represent another growing segment. Regions such as Dealu Mare and Cotnari have developed wine tourism through vineyard visits, wine tastings, and accommodation services. This type of tourism attracts visitors interested in gastronomy and local culture (Ana, 2017).

Fruit-growing farms and orchards also contribute to agritourism development. In counties such as Argeş and Bistriţa-Năşăud, tourists can participate in fruit harvesting and traditional jam or brandy production. These activities are especially attractive for families and educational tourism (Toader and Mocuta, 2018).

In the Danube Delta, agritourism is strongly connected to fishing activities. Guesthouses provide services such as boat trips, birdwatching, traditional fishing, and fish-based meals. This creates a unique tourism product compared to other rural regions in Romania (Micula et al., 2023).

Besides accommodation, most agritourism farms offer traditional gastronomy based on local and homemade products, including cheese, honey, vegetables, and smoked meat. Recreational services such as horse riding, hiking, handicraft workshops, and participation in local festivals are also common (Vasiu et al., 2021).

Educational activities have become increasingly important in recent years. Many farms organize programs related to sustainable agriculture, environmental protection, and traditional food production, especially for children and school groups (Toader and Mocuta, 2018).

Capacity, Prices, and Seasonality

The total accommodation units in Romania grew substantially from 11,736 in 2021 to 14,325 in 2025 (a strong 22% increase) while the agritouristic units saw steady growth, increasing from 3,460 to 3,668 units (+6%) causing a loss in market share from 29.5% to 25.6%. By number of bed places, agritourism accounts for 13.1% (61K from a total of 464k) from the Romanian accommodation market. The average number of bed places/unit is 16.5, the equivalent of 7-8 rooms, 8 rooms being the maximum permitted by the Romanian legislation. The territorial distribution of the accommodation units shows an uneven one with a massive concentration of agritourism units in the mountainous, hilly, and historically cultural regions, while the southern plains and parts of the east show minimal development, as can be seen in Figure 1. Statistical data show a similar distribution for the number of bed places.

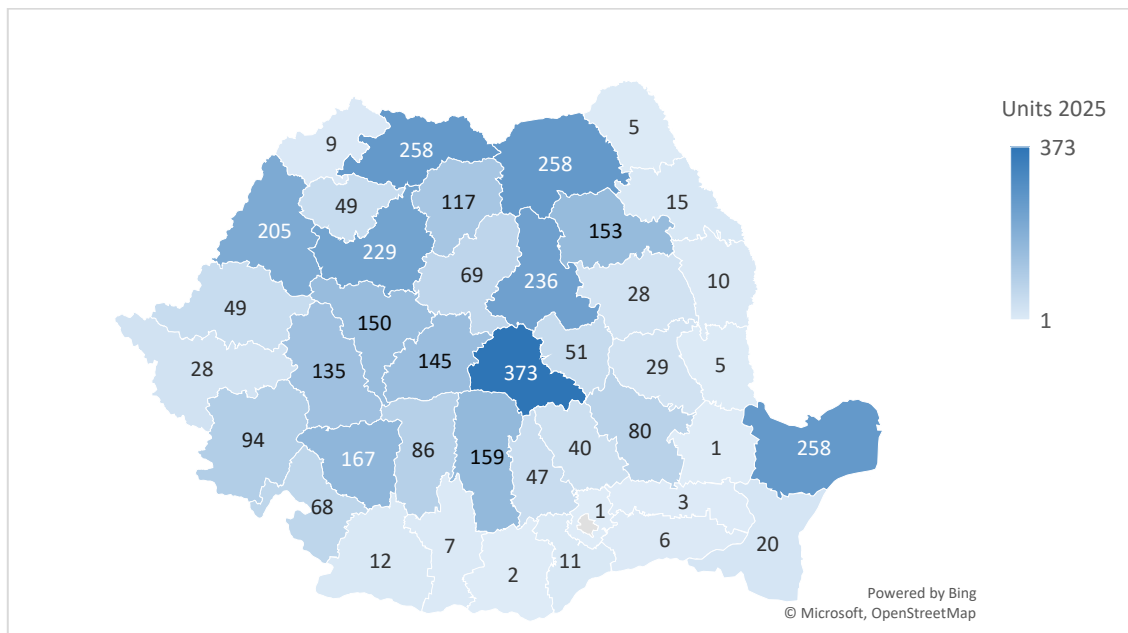


Figure. 1 Territorial distribution for the agritourism accommodation units

The Absolute Hotspot: **Brașov** County is the dark blue centerpiece with 373 units, the highest in the country. This is unsurprising given its famous agritourism hubs (like Bran-Moeciu), established alpine tourism, and accessibility. This dominant position is closely linked to the county's long-standing reputation as one of Romania's most important tourism destinations. Areas such as Bran and Moieciu have become symbols of Romanian agritourism due to their combination of mountain scenery, traditional villages, and well-developed guesthouse networks. The county benefits from a diversified tourism profile that includes rural tourism, cultural tourism, winter sports, and adventure tourism. Its strategic location in central Romania and its accessibility from Bucharest and other large cities contribute significantly to the continuous growth of tourist flows. The tourism infrastructure is highly developed, including modern accommodation units, transport connections, ski resorts, and leisure facilities that support year-round tourism activities. During winter, destinations such as Poiana Brașov attract large numbers of tourists interested in skiing and mountain recreation, while summer tourism focuses on hiking, cycling, and rural experiences. The county also benefits from the international notoriety of Bran Castle, frequently associated with the Dracula legend, which increases foreign tourist arrivals. In addition, the preservation of traditional architecture and local customs in surrounding villages contributes to the authenticity of the agritourism experience. Brașov's balanced combination of natural attractions, cultural heritage, and modern tourism services explains why it remains the leading county in terms of rural accommodation development.

Secondary major hubs (with the same number of units - 258) are:

- **Maramureș** (North) – Famous for traditional wooden architecture and preserved cultural heritage. **Maramureș County** is widely recognized as one of the best-preserved ethnographic regions in Romania, famous for its traditional wooden architecture and authentic rural lifestyle. The county is particularly valued for its ability to maintain centuries-old customs, crafts, and social traditions that have disappeared from many other regions. Tourists are attracted by the iconic wooden churches, several of which

are included on the UNESCO World Heritage list due to their historical and architectural significance. Villages in Maramureş preserve a distinctive visual identity characterized by carved wooden gates, traditional houses, and local artisanal craftsmanship. Rural tourism in the county is strongly based on authenticity, offering visitors direct interaction with local communities and traditional agricultural practices. Cultural events, religious celebrations, and folk festivals play a major role in attracting tourists interested in heritage tourism and local traditions. The county's mountainous landscapes and natural environment also support ecotourism, hiking, and outdoor recreational activities. In many villages, agritourism guesthouses combine traditional aesthetics with modern comfort, creating an appealing balance between authenticity and accessibility. Maramureş also benefits from increasing international recognition as a destination for cultural and sustainable tourism. Furthermore, the strong sense of regional identity and the preservation of intangible cultural heritage contribute significantly to the county's attractiveness within Romania's rural tourism sector.

- **Suceava** (Northeast / Bucovina) – Renowned for its painted monasteries and traditional rural hospitality.

Suceava County is renowned for the painted monasteries of Bucovina, which represent some of the most important cultural and religious monuments in Romania. These monasteries are internationally recognized for their exterior frescoes, vivid colors, and historical value, attracting both pilgrims and cultural tourists throughout the year. The county has developed a strong tourism identity based on the interaction between spirituality, tradition, and rural hospitality. Rural accommodation units frequently promote Bucovinian customs, traditional gastronomy, and handcrafted decorative elements that enhance the authenticity of the visitor experience. In addition to religious tourism, Suceava also benefits from its diverse natural landscape, including forests, hills, and mountainous areas suitable for ecotourism and outdoor recreation. Tourism in the county is supported by a rich ethnographic heritage reflected in local festivals, traditional music, and artisanal crafts. Many villages preserve traditional architectural styles and maintain strong connections to agricultural and pastoral activities, which further supports agritourism development. The county's tourism appeal is also strengthened by its relatively peaceful rural environment and the perception of Bucovina as a region of spiritual and cultural authenticity. Moreover, investments in rural guesthouses and tourism infrastructure have contributed to the steady growth of accommodation capacity in recent years. Through the combination of cultural heritage, religious significance, and natural attractions, Suceava has become one of the most representative rural tourism regions in northeastern Romania.

- **Tulcea** (Southeast) – Home to the Danube Delta, attracting eco-tourists and unique water-based rural lodging. **Tulcea County** occupies a unique position within Romania's tourism landscape due to the presence of the Danube Delta, one of Europe's largest and best-preserved wetland ecosystems. The Delta represents a UNESCO Biosphere Reserve and attracts visitors interested in ecotourism, biodiversity, and sustainable travel experiences. The region is internationally recognized for its exceptional variety of bird species, aquatic ecosystems, and natural landscapes that cannot be found elsewhere in Romania. Tourism activities are strongly connected to the natural environment and include boat excursions, birdwatching, sport fishing, photography tourism, and slow

tourism experiences. Rural accommodation units in Tulcea are often adapted to the specific characteristics of the Delta, incorporating local architecture, traditional fishing culture, and fish-based gastronomy into the tourism experience. Many guesthouses emphasize sustainability and ecological practices in order to preserve the fragile natural environment that supports the local tourism economy. The county's tourism profile differs significantly from mountain-based rural tourism regions because it focuses primarily on water-based activities and environmental exploration. Tulcea has also experienced increasing international visibility as global demand for ecotourism and nature-oriented travel continues to expand. In addition, the multicultural character of the region, influenced by Romanian, Lipovan, Turkish, and other ethnic communities, contributes to the diversity of local traditions and cultural experiences. The combination of natural uniqueness, ecological value, and traditional rural hospitality makes Tulcea one of Romania's most distinctive and internationally attractive rural tourism destinations.

It can be observed that the regions that have successfully branded their local identity globally and nationally—such as Bucovina (Suceava), Maramureș, the Danube Delta (Tulcea), and Bran (Brașov)—are clearly leading the market. Also, there is a direct correlation between hilly/mountainous terrain and the success of agritourism. Flat, plain-dominated counties have failing or non-existent agritourism sectors.

This indicates that both tourists and property owners prefer an intermediate comfort segment that balances affordability with acceptable service quality. The luxury segment (5*) remains rare in rural tourism settings and is concentrated mainly in mountain resorts and internationally recognized tourism areas.

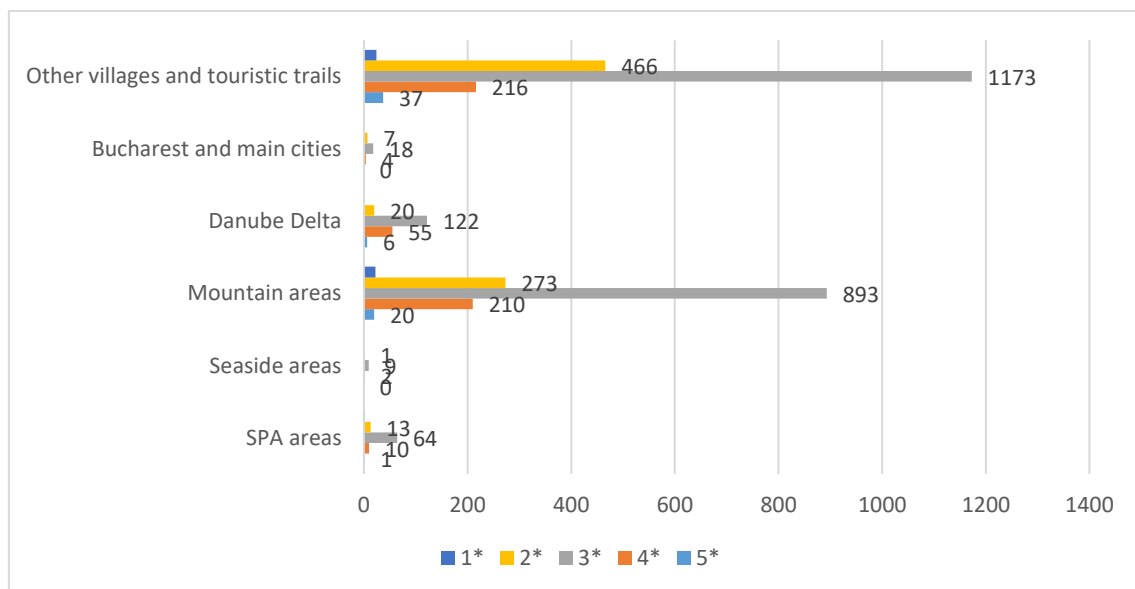


Figure. 2 Distribution of agritourist units by area and by comfort category

For the mountain areas two tiers (2 Stars – 273 units and 4 Stars-210 units) are relatively close. This shows a market polarization: the mountains attract both budget-conscious travelers (hikers,

youth) and premium clients (corporate retreats, families looking for high-end amenities). Otherwise, 3* category heavily dominate the alpine landscape with a number of 893 units.

Danube Delta, a unique eco-tourism zone where total capacity is lower due to geographical and environmental regulations (Biosphere Reserve) has an excellent ratio of 4-star units relative to its total size, reflecting heavy investment in premium fishing resorts and eco-lodges.

Seasonality reflects the classic behavior of mass and rural tourism in Romania, characterized by a massive summer peak, a severe autumn contraction, and smaller spikes driven by winter holidays. Data for 2025 show that August is the absolute peak of the year: It registers 171,692 arrivals (2.7 times higher than November's 63,831 arrivals) and a record-breaking 351,650 overnights. With 142,483 arrivals and 289,189 overnights, July cements the core of the high season.

Average prices in Romanian agritourism guesthouses vary significantly depending on region, comfort category, and seasonality. In 2025, standard 3-star agritourism guesthouses generally charged between 250 and 450 RON per night for a double room, while premium 4-star rural lodgings in Braşov or Tulcea frequently exceeded 600–800 RON during peak summer and winter seasons. Lower-category rural accommodation in peripheral regions remained considerably cheaper, often below 200 RON per night.

Overall, the Romanian agritourism sector demonstrates a moderate but continuous expansion, characterized by strong territorial concentration, increasing diversification of accommodation standards, and growing investment in premium rural tourism experiences. Despite significant regional disparities and pronounced seasonality, agritourism remains an important instrument for rural economic development, cultural preservation, and the valorization of local natural and agricultural resources.

Marketing channels

Marketing channels are essential for the development of agritourism in Romania, especially in the context of increasing digitalization. Most agritourism guesthouses promote their services through online platforms, social media, and tourism websites in order to attract both domestic and international tourists. Recent studies show that digital marketing has become one of the main tools for improving the visibility of Romanian tourism destinations (Pricopoaia et al., 2024).

Online booking platforms such as Booking.com and Airbnb are among the most frequently used marketing channels by Romanian agritourism businesses. These platforms allow guesthouses to reach larger audiences, manage reservations efficiently, and benefit from customer reviews and ratings. Digital promotion is increasingly important as tourists rely heavily on online information when choosing rural destinations (Pascariu et al., 2024).

Social media platforms such as Facebook, Instagram, and TikTok are widely used to promote traditional food, local culture, and rural experiences. Research on Romanian tourism destinations demonstrates that Facebook communication and visual content significantly influence tourist engagement and destination attractiveness (Ivasciuc et al., 2024).

In addition to digital channels, tourism fairs, local festivals, and partnerships with tourism associations continue to support the promotion of agritourism. Organizations such as ANTREC

Romania contribute to the national and international visibility of Romanian rural tourism products.

Despite progress in digital marketing, many small agritourism businesses still face challenges related to limited financial resources and insufficient digital skills. According to recent studies, Romania still records lower levels of digital marketing implementation compared to the European average, especially among small rural enterprises (DAFE Digital, 2025).

Level of Professionalization and Digitalization

The level of professionalization and digitalization in Romanian agritourism has improved in recent years, mainly due to the growing importance of online tourism services and European rural development programs. However, important differences still exist between developed tourist regions and less competitive rural areas.

Most agritourism businesses in Romania are family-owned enterprises, where management and customer services are handled directly by the owners. Recent studies conducted in Maramureş and Bucovina show that hospitality quality and cultural authenticity are highly appreciated by tourists, but many businesses still face problems related to limited staff training and weak managerial practices (Moldovan et al., 2025).

Professionalization has increased through participation in tourism associations, local partnerships, and European-funded projects. Research focused on Iaşi County highlights that sustainable agritourism development depends on improving service quality, staff qualifications, and strategic tourism management (Dincu et al., 2025).

Digitalization has become a major factor influencing competitiveness in rural tourism. Most agritourism guesthouses now use online booking systems, social media promotion, and digital communication tools to interact with tourists. Studies on Romanian rural tourism show that digital storytelling, influencer marketing, and social media campaigns play an increasingly important role in attracting younger tourists interested in authentic rural experiences (Ibric et al., 2025).

Despite these developments, the implementation of advanced digital technologies remains relatively limited. Many small rural businesses still rely on basic digital tools because of financial constraints, insufficient digital skills, and limited technological infrastructure. According to recent research, Romanian rural tourism operators mainly use social media and booking platforms, while professional websites, online payment systems, and automated management tools are less common (Istoc, 2025).

New technologies such as artificial intelligence, virtual experiences, and smart tourism applications are gradually entering the agritourism sector. Research on sustainable agritourism and emerging technologies emphasizes that digital innovation can improve customer experiences, increase operational efficiency, and support sustainable rural development (Stancioiu and Ionica, 2025).

Overall, Romanian agritourism is becoming more professionalized and digitally connected, but the sector still requires investment in training, infrastructure, and digital competencies in order to remain competitive on the European tourism market.

Environment and Market Analysis

Agritourism is a form of tourism with deep roots in Romania, an unorganized practice since the interwar period, when "lodging with citizens" of visitors from urban areas was a common custom in Romanian villages. Agritourism includes activities complementary to agricultural ones (Marin, 2018), contributing to increased income through the valorisation of natural, cultural, and social resources (Franzutti et al., 2019), as well as to the preservation and promotion of traditional agricultural practices (Nistoreanu et al., 2020). In Romania, this type of tourism combines accommodation, hospitality, and experiences specific to the rural environment, such as participation in agricultural activities, consumption of local products, and the discovery of village traditions and customs. This combination gives agritourism an authentic character, distinguishing it from urban or mass tourism and increasing its appeal among individuals interested in nature, traditions, and rural community life.

In an environment dominated by rapid change, with major repercussions on tourism globally, the use of scientific analysis tools is not a secondary option, but a necessity. The **PESTEL** instrument enables the identification of political (P), economic (E), social (S), technological (T), ecological (E), and legal (L) factors, providing an overview of the external macroeconomic elements that directly or indirectly influence the agritourism sector in Romania, highlighting the essential risks as well as the opportunities for its development.

Political factors

Political factors have a key role to play in the development of agritourism in Romania, as this sector is highly dependent on public policies, European funding and rural development strategies. A current concept is sustainability, which contributes to protecting natural and cultural resources, supporting local communities, ensuring a balance between economic development and environmental preservation for future generations. Thus, national and European public policies are following this direction. The field of agritourism is no exception.

At European level, the EU Strategy for Sustainable Tourism, adopted by the European Parliament in 2021, highlights new trends in tourism, mainly generated by digitalisation, and incorporates alternative forms, including agritourism (EU, 2021).

At national level, the major documents are: Romania's 2030 Sustainable Development Strategy - the encouragement of the continuous development of agritourism has been set as a strategic target; -, Romania's National Strategy for Tourism Development 2023–2035 - aims to achieve long-term competitive tourism, through the development of agritourism, ecotourism, rural, spa and cultural tourism, as well as by improving Romania's image as a tourist destination; - National Strategic Plan 2023–2027 – capitalizes on natural and human resources in rural areas to support activities such as rural tourism and agritourism, processing of local products, crafts or e-commerce.

Another influencing factor is political instability: frequent changes of governments in Romania often lead to shifts in priorities in tourism. The risk of infringement, in conjunction with the frequent changes in the political paradigm can generate major risks, especially given that many

operators rely almost exclusively on non-reimbursable financing to cover the costs of modernization and development.

It is also worth mentioning the regional political context, marked for too long by the war between Russia and Ukraine, a war that can slow down entrepreneurial intentions or create a slight reluctance for certain foreign tourists, especially from outside Europe.

Economic factors

Economic factors have a major influence on agritourism in Romania, because they determine both the demand and the ability of bidders to invest, develop and maintain competitive prices. The most important factors are: the population's income, price levels, service costs and access to finance.

As for household incomes, they increased in 2024 and 2025, but inflation rates above the European average, of 5.6% in 2024 and 7.3% in 2025 respectively (INS, 2026), have blurred the increases. With only 18% foreign tourists (INS, 2026), agritourism in Romania depends on Romanians' interest in their country, an interest transformed into consumption under the conditions of adequate financial resources. If inflation is high, the direct consequence is to reduce the consumption of recreational services, including in the field of agritourism. Thus, we are talking about a shortening of the duration of stays and the constant interest in last-minute offers, which have a quality-price ratio appreciated as opportune by tourists.

Another influencing factor is represented by holiday vouchers, whose value has been reduced by half—from 1,600 RON/year to 800 RON/year (approximately 310 to 155 EUR/year, at an exchange rate of 1 EUR = 5.2 RON)—correlating with the reduction of the eligibility salary threshold from 8,000 RON net/month (approximately 1,540 EUR/month) to 6,000 RON net/month (approximately 1,150 EUR/month), which limits the number of beneficiaries in the public sector. This change negatively affects tourism demand, including agritourism products. Holiday vouchers are also granted in the private sector, within the limit of six gross minimum salaries per year (24,300 RON/year, approximately 4,675 EUR/year), at the employer's discretion. It should be noted that these vouchers can only be used for domestic tourism services, thereby contributing to the estimation of internal consumption.

The increase in operational costs in recent years has become one of the main challenges for small businesses in rural areas. In Romania, electricity prices registered significant increases during the peak of the energy crisis, rising by over 20–30% compared to pre-2021 levels, which directly affected the operating costs of accommodation units (lighting, heating, and air conditioning). In parallel, natural gas has experienced significant fluctuations, with increases of more than 40% in certain periods of high consumption, especially influencing heating costs during the cold season. Food has frequently had annual increases of 10–15%, which has directly affected agritourism structures that offer meal services based on local products. In this context, the total operating costs for guesthouses and tourist farms have increased by an estimated 15–25%, depending on the size of the unit and the degree of energy autonomy (Eurostat, 2026). This evolution leads owners to adopt either strategies to increase accommodation rates or efficiency measures, such as investments in renewable energy, direct local supply or waste reduction.

In line with the strategic documents presented in the previous subsection, the European Union's Common Agricultural Policy (CAP) promotes the diversification of economic activities in rural areas through funding programmes dedicated to farms and agritourism guesthouses. European funds granted through the National Rural Development Programme (PNDR) contribute to the modernisation of tourism infrastructure and to increasing the competitiveness of rural areas in Romania. Studies show that European subsidies have had a positive impact on the development of agritourism and on reducing economic marginalization in rural areas (Galluzzo, 2021). A particularly important role is played by the LEADER programme, which provides support of up to €200,000 for the establishment of rural micro-enterprises and for local projects in the fields of tourism, including agritourism.

Social factors

Social factors explain the tourist demand, the visitor profile and how rural communities can offer authentic experiences.

In Romanian agritourism we can talk about a change in the consumer profile. Urbanization in cities such as Bucharest, Iasi, Cluj Napoca and its "ugly face" represented mainly by crowds, pollution and stress, have changed people's needs. Now, they seek tranquility, fresh air, a return to nature and, more recently, digital detox. The Romanian rural area offers all of this because, unlike in other European countries, modernisation has progressed at a much slower pace (MADR, 2013). In addition, health-related concerns have become more prominent, particularly in the context of the COVID-19 pandemic.

Studies show that half of Generation Y and Z travellers are more concerned with experiences than with ticking off destinations (Accor, 2025). This suggests a return to cultural identity, specifically the search for authenticity in gastronomy, craftsmanship and communities preserved over time. This is what Romanian agritourism can generously offer.

Another important social factor is the depopulation of villages and the migration of young people to urban areas or other European countries. Many rural communities in Romania are facing an ageing population and a shrinking workforce, which affects local economic development. In this context, agritourism is considered a solution for revitalising rural communities and creating new jobs (Oltean et al., 2024).

Although the lack of qualified personnel in rural Romanian tourism is not a new problem, it is exacerbated by the factors mentioned above. The low level of professional training and even education poses significant challenges for entrepreneurs. This has a direct impact on service quality in an industry where people still make a difference. However, basic skills can also be developed through programmes at technological high schools, vocational schools, and training centres that offer certificates such as "Agritourism Worker" or "Agritourism Technician". These programmes develop skills related to tourism services, gastronomy, agriculture, and interaction with tourists. The European Erasmus+ programme also offers excellent opportunities for international exchanges of good practices and market information.



Technological factors

The adoption of technology is no longer at the entrepreneur's discretion, but a condition for survival in the market. For many tourists today, speed is equated with immediacy. Even those who visit travel agencies expect prompt responses. Ilie et al. (2025) show that in Romanian agritourism, the use of digital tools such as online booking platforms, social networks, and immersive technologies (e.g., virtual reality tours) is increasing and is considered vital for promoting agritourism and enhancing tourism experiences. The emphasis on digitalisation and the adoption of modern marketing is also supported by Oltean et al. (2024). Platforms such as Booking.com and Airbnb.com now compete with Lapensiuni.ro, Travelminit.ro, Turistinfo.ro, and Directbooking.ro.

An important factor is the quality of the technology. High-speed internet access and the expansion of mobile networks increase the competitiveness of agritourism businesses and enable the implementation of modern services. According to the European report "Digital Decade 2025", Romania is among the last EU member states in terms of digital skills and the digitisation of the economy, although it performs well in fixed connectivity, including in sparsely populated areas (European Commission, 2025).

Technological modernisation and the construction of new farms and agritourism guesthouses support the development of sustainable tourism. The use of renewable energy, intelligent resource management systems, and modern agricultural equipment can reduce operational costs and environmental impact. These investments are also supported by European funds dedicated to rural development and digitalization of SMEs (AFIR, 2026).

Ecological factors

Climate change is rewriting the rules of agritourism in Romania. The transition from predictable tourism, based on four distinct seasons, to one marked by extremes, brings major challenges, but also unexpected opportunities for entrepreneurs. Famous for their traditional winter holidays, the regions of Maramureş and Bucovina have experienced temperatures above 10°C and completely green landscapes in recent years. Guesthouses are forced to reconfigure their offering, replacing horse-drawn sleigh rides with carriage rides. At the same time, extreme weather events are also affecting agricultural production, which directly impacts agritourism activities. For instance, hailstorms that damage plum crops lead to a shortage of raw materials used for traditional products such as jam or spirits. Similarly, fruit-picking activities, which represent an important attraction for tourists, are increasingly threatened by declining harvests and unpredictable weather conditions.

However, we must acknowledge that waste management is also an issue in rural areas. Water and soil pollution occur in many locations. Certification by the Romanian Ecotourism Association (AER) for some guesthouses indicates that waste is managed internally. The owners organise activities to clean local paths and rivers together with tourists and children from the village. Thus, agritourism becomes an educational tool for the entire rural community, showing locals that a clean street attracts tourists who are willing to pay more.

Legal factors

The legal framework in Romania directly affects the development of agritourism through strict regulations on the classification, authorisation and operation of tourist accommodation structures. While initiatives such as Local Gastronomic Points (PGLs) represent a positive legislative step – allowing households to legally serve meals to up to 15 people under a simplified regime – classification standards still involve cumbersome bureaucracy. This administrative burden contrasts sharply with European trends, which favour simplification and self-regulation in the context of digitalisation and the transition to a green economy (European Agenda for Tourism 2030, Council of Europe, 2023).

In addition to administrative issues, entrepreneurs in the sector face increasing tax pressure and stringent safety regulations. Changes to VAT rates in the HoReCa sector, new rules for the taxation of micro-enterprises, and local taxes on non-residential buildings make it difficult for small guesthouse owners. Furthermore, to offer traditional dishes, they must comply with strict hygiene and food safety standards imposed by ANSVSA, as well as environmental protection regulations that limit the impact of buildings and tourist activities in protected areas.

Finally, accessing European funding through the National Strategic Plan and the Agency for Financing Rural Investments (AFIR) is a vital pillar, but is subject to strict eligibility rules and sustainable development criteria. The main obstacles to the sustainable development of this sector are legislative instability and administrative bureaucracy. Frequent legislative changes hinder both the initial authorization of guesthouses and the efficient implementation of EU-funded projects, given that these small structures, managed by less experienced entrepreneurs, must navigate the same complex bureaucratic stages.

Competition Analysis

Competition in Romanian agritourism is increasingly based on the authenticity of the experience offered to tourists, where guesthouses that integrate genuine agricultural activities and local gastronomy stand out. In oversaturated tourist areas, such as Bran-Moeciu or Mărginimea Sibiului, competition is intense, and differentiation is achieved through premium facilities and personalised services. Conversely, less developed tourist regions offer significant opportunities for guesthouses that can attract a steady flow of visitors. Traditional gastronomy and authorisation as a Local Gastronomic Point are important competitive advantages, as tourists value authentic products and local ingredients. In addition, online visibility and promotion through platforms such as Booking, Airbnb, Instagram, or TikTok significantly influence a guesthouse's success. Establishments that receive excellent reviews and invest in digital storytelling attract more customers and strengthen their reputation. In conclusion, success in agritourism depends on the ability of guesthouses to transform the countryside into a memorable cultural, gastronomic, and relaxing experience.

Barriers to entry and opportunities

Among the **barriers to entry** into the agritourism market in Romania are the following:

- *Permits and regulations* – obtaining permits for operation and classification of units is a complicated process; securing sanitary, environmental, fire, and urban planning permits

can be slow and expensive; compliance with construction norms and safety standards for agritourism guesthouses is difficult to achieve.

- *High entry costs* for accommodation or food units – construction or rehabilitation of buildings, furnishing of rooms, and infrastructure (water, sewerage, electricity, internet) can result in significant losses if the business is not successful.
- *Operating capital* – required for at least 1–2 years until a steady flow of tourists is established. *Poor general infrastructure* in rural areas – roads, water, and sewerage.
- *Areas with potential and tradition*, such as Suceava, Braşov, and Maramureş – *already saturated* in terms of accommodation.
- *Online promotion costs* – maintaining a constant presence on social media and proper site indexing;
- *Access and maintenance costs* on booking platforms – sometimes high, for small businesses.
- *Human resources* – difficult to find, train, and retain.

Among the **opportunities** are:

- *Funds and financing mechanisms* – access to dedicated financing initiatives, non-reimbursable funds, credit facilities;
- *Changing the consumer's way of thinking* – increased interest in tradition, experience, nature and practical activities;
- *Opportunities for innovation and adaptation* – in particular in the case of leisure services;
- *Sufficient natural and cultural resources* - with multiple possibilities of capitalization.

Sustainability and Impact

A very important element in analyzing the sustainability and impact of agritourism in Romania is the touristic potential. The touristic potential is defined as the set of natural and anthropogenic resources of an area, which through their attractiveness can generate and support tourism activities (Roşu, 2016). In numerous studies the touristic potential is analysed, for example for the following parts of Romania: Southern Transylvania (Stefan et al., 2021), North-East Development Region (Mihăilă et al, 2019), Moldavia (Iatu & Bulai, 2021), South Muntenia (Nedelcu, 2014), South-East (Andrei & Manolache, 2014). By establishing the connection between tourist heritage and agritourism, it encompasses that both includes the tourist potential of a territory, consisting of natural, social, economic and cultural elements, and the infrastructure intended for tourism (Ciobanu & Draghici, 2016). The analysis of agritourism potential is essential for understanding how key elements such as traditional food, nature-based activities, cultural experiences, and interaction with rural communities can be effectively adapted to tourists' expectations and local development needs. (Ciolac et al., 2019)

Local economic impact

The tourism sector has become a major driver of economic growth and development worldwide. In 2024, tourism contributed nearly five percent to Romania's GDP.

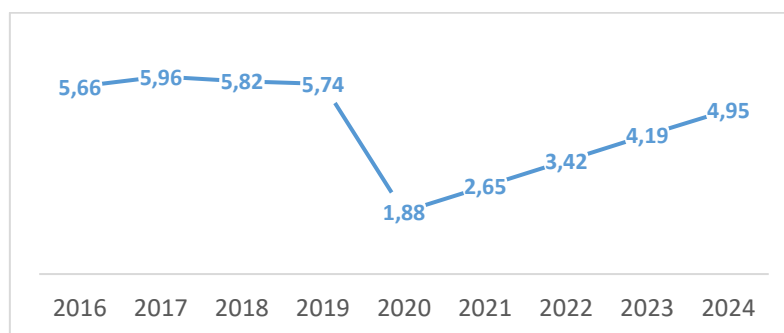


Figure 3: Share of the GDP of the tourism sector in Romania from 2016 to 2024

Source: STATISTA, Travel, Tourism & Hospitality

The country's diverse natural landscape — including the Carpathian Mountains, the Black Sea coast, the Danube Delta, extensive forests, rivers, and lakes — makes Romania one of Europe's most attractive tourist destinations. Romania is also home to several UNESCO World Heritage sites, such as the Churches of Moldova, Maramureș, and Transylvania, the Dacian Fortresses, and the Danube Delta.

The average net monthly salary in Romania's hospitality sector reached its highest level in 2024, amounting to 3,325 Romanian lei. In contrast, during the 2020 coronavirus pandemic, the average monthly salary declined significantly to 1,753 Romanian lei.

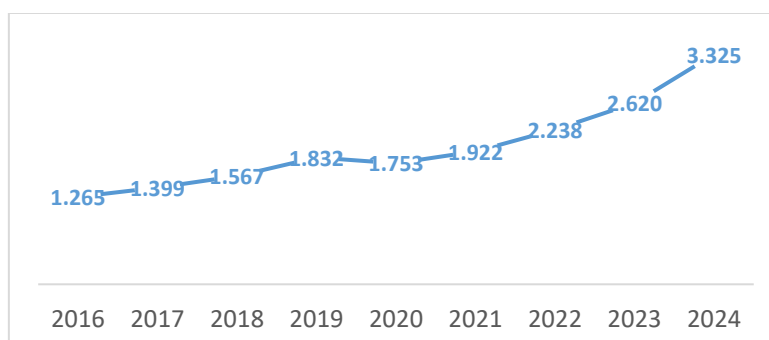


Figure 4: Average net monthly salary in the hospitality industry in Romania from 2016 to 2024 (in Romanian lei)

Source: STATISTA, Travel, Tourism & Hospitality

Between 2021 and the first half of 2025, the number of tourist accommodation establishments in Romania generally followed an upward trend across most categories. Agritourism establishments recorded the highest figures throughout the period, increasing from 1,567 units in 2021 to 2,051 units in the first half of 2025.

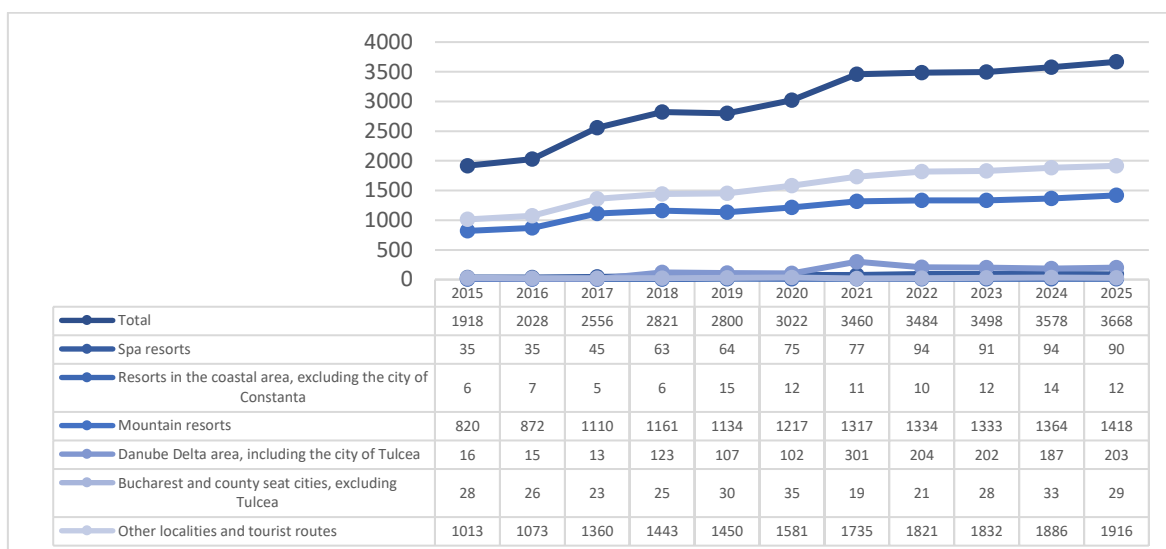


Figure 5: Number of agritourism guesthouses with accommodation functions by type of tourist destination

Source: National Institute of Statistics

The steady increase in the number of accommodation units, particularly in mountain resorts, the Danube Delta area, and other localities and tourist routes, highlights the expansion and diversification of tourism infrastructure in rural and nature-based destinations. This growth has contributed significantly to local economic development through increased investments, job creation, and the stimulation of complementary sectors such as public catering, transport, handicrafts, and local product commercialization.

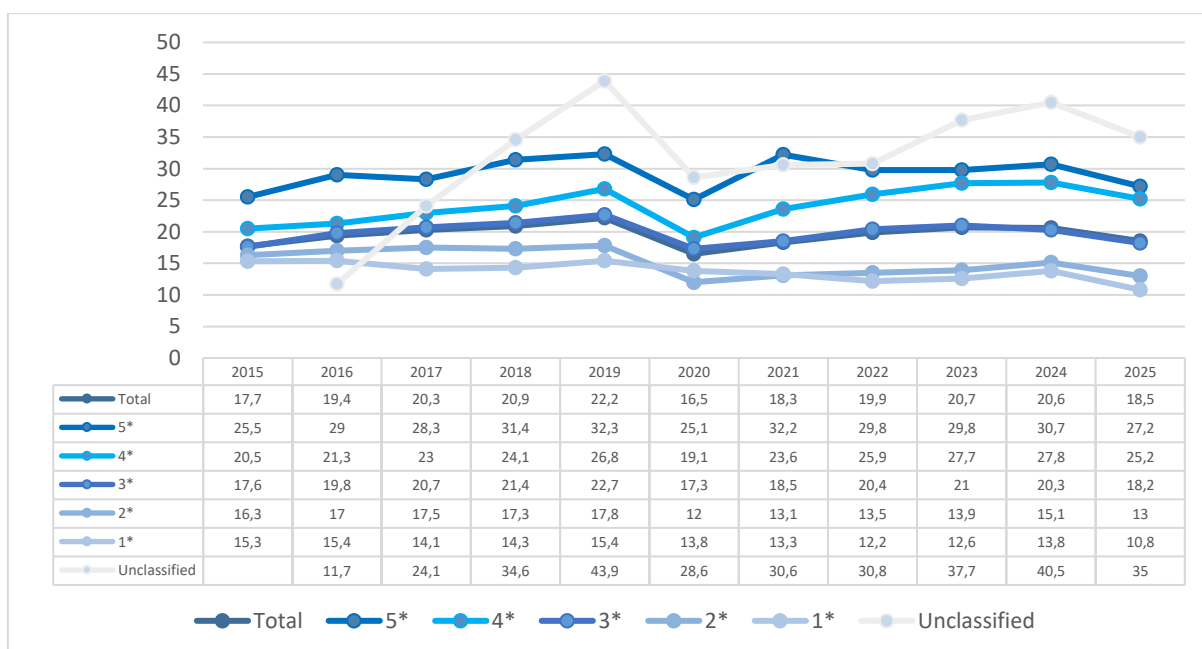


Figure 6: Net utilization index of agritourism accommodation capacity by comfort categories (%)

Source: National Institute of Statistics

The net utilization index of agritourist accommodation capacity highlights a moderate increase in occupancy rates across tourist reception structures during the 2015–2025 period, with fluctuations influenced by economic changes and the effects of the 2020 pandemic.

The increase in occupancy rates within 4-star and 5-star accommodation structures indicates a growing demand for higher-quality tourism services, contributing to local investments, income diversification, and job creation in rural communities. The relatively stable utilization of medium and lower category accommodation units demonstrates the role of agritourism in supporting small family businesses.

In their study, Ciobanu et al. (2016) concluded that the tourism potential of the South-East Development Region is insufficiently exploited and, for example, in Tulcea County, rural tourism represents one of the main opportunities for economic development, as it requires relatively low investment while generating increasing interest among tourists.

Social and cultural impact

Agritourism generates significant social and cultural effects within rural communities by supporting local traditions, preserving cultural identity, and encouraging the active involvement of residents in tourism-related activities. The expansion of agritourism infrastructure supports the revitalization of rural communities by encouraging entrepreneurship, improving living standards, and preserving local traditions and cultural heritage. The notable increase in accommodation facilities in areas such as the Danube Delta (203 units in 2025) also demonstrates the rising attractiveness of experiential and eco-oriented tourism.

From a social perspective, the development of agritourism contributes to the revitalization of rural communities by preserving traditions, encouraging local entrepreneurship, and reducing migration from rural to urban areas or abroad. The temporary decline in the utilization index in 2020 reflects the sector's vulnerability to external shocks; however, the subsequent recovery demonstrates the adaptability of rural tourism activities and the increasing interest in sustainable and experience-based tourism.

Various agritourism and rural development projects implemented in Romania have highlighted the important social and cultural impact of tourism activities on rural communities. These initiatives contribute to the preservation of local traditions and cultural heritage, encourage community involvement, and support the revitalization of rural areas by creating stronger connections between visitors and residents.

Via Transilvanica is long-distance cultural and tourist route that connects rural communities and promotes guesthouses, local gastronomy and traditions in the areas crossed. In a study realised by Tătar (2024), the authors concluded that Via Transilvanica play an important role in strengthening social cohesion by encouraging interaction, collaboration, and a sense of belonging among residents.

Eco Maramureș (Constantin et al., 2022; Kovacs et al., 2025) is an ecotourism initiative that promotes rural guesthouses, crafts and authentic experiences from Maramureș. By integrating agricultural traditions, local food products, and rural lifestyles into tourism activities, the

initiative supports the diversification of rural incomes, the preservation of cultural heritage, and the alignment of agritourism with sustainable rural development policies.

Local Gastronomy Points which are small-scale rural food establishments authorized to prepare and serve traditional homemade products based primarily on local resources and recipes, represent an increasingly important component of agritourism development in Romania. In 2026 there are 702 units registered, with 679 units in 2025, 476 in 2024, and 316 units 2023, most of units being situated in Brasov County. (PGL Romania; PGL Romania website)

In general, the mix of diverse agritourism visitor categories, including older travelers, mid-life travelers, young travelers, and families, enhances social interaction and cultural exchange. (Cbi.eu, 2026)

Environmental impact

Agritourism supports sustainable tourism practices and the valorization of natural resources, but the expansion of tourism infrastructure also requires careful management to reduce environmental pressure on fragile ecosystems, especially in mountain areas and the Danube Delta.

The growing use of agritourism accommodation structures and utilization index may generate positive effects through the promotion of responsible tourism and the consumption of local products, thereby reducing dependence on long supply chains. Nevertheless, the intensification of tourism activities also requires sustainable management of natural resources to prevent pressure on rural ecosystems and the degradation of natural landscapes.

Studies conducted about Apuseni Mountains indicate that agritourism supports environmental conservation and community resilience. According to Ciolac et al. (2021), agritourism contributes to income diversification and long-term rural sustainability in Romania.

The authors Ispas et al. (2019) conducted interviews with managers involved in agritourism and found out that although owner-managers recognize the importance of natural resource conservation, limited resources and a stronger reliance on technological saving systems reduce both their involvement in sustainability initiatives and their confidence in tourists' contribution to environmental protection.

Alignment with rural development policies

EU financial subsidies positively influence agritourism development and reduce rural marginalization (Galluzo, 2021). The development of agritourism in Romania has been closely aligned with rural development policies through successive European and national funding programmes, including the National Rural Development Programme 2007–2013 through Measure 313 “Encouragement of tourism activities”, and the National Rural Development Programme 2014–2020 through Measure 6.4 “Investments in the creation and development of non-agricultural activities”.

Measure 313 “Encouragement of tourism activities” a total of 1,244 projects were contracted, with a value exceeding EUR 174 million. Approximately EUR 138 million was disbursed for the projects financed through this measure. (AFIR, a)

Measure 6.4. “Investments in the creation and development of non-agricultural activities” a total of 808 projects were contracted, generating approximately 1,400 new jobs. The total public value of these projects amounted to EUR 133.1 million, of which EUR 126.2 million represented public expenditure. Investments implemented through this sub-measure include tourism, public catering, leisure activities, and local gastronomic points; craft activities; as well as the production and commercialization of non-agricultural products. (AFIR, b)

Romania’s National Tourism Development Strategy 2025–2035 (2026) incorporates, for examples, SDG 8 by emphasizing the role of agritourism in promoting sustainable economic growth and rural employment. The strategy explicitly recognizes the importance of increasing the number of agritourism guesthouses as a key factor in supporting rural development, local entrepreneurship, and sustainable tourism activities. These policies supported investments in rural accommodation are also supported by: The Law of the Mountain (2018), Smart Specialization Strategies 2021-2027, Ecotourism Development Strategy and Action Plan for 2023-2029, National Strategy for Seaside Tourism 2019 - Decision no. 571 or Romania's Sustainable Development Strategy 2030. (World Bank, 2023)

Agritourism is increasingly recognized as an important instrument for rural development policies, as it supports economic diversification, job creation, cultural heritage preservation, and sustainable community development in rural areas. The study case of Sâncraiu (Gica et al., 2021) illustrates how well-managed rural tourism can contribute to the achievement of several Sustainable Development Goals (SDGs), particularly SDG 1, SDG 8, SDG 10, SDG 11, SDG 12, and SDG 17, through the promotion of local entrepreneurship, cultural identity, community partnerships, and sustainable local development.

Trends and Future Scenarios

Innovation in Agritourism

The Romanian agritourism sector is undergoing a progressive technological and experiential transformation, driven by the convergence of shifting tourist expectations, digital disruption, and the wider sustainability agenda that is reshaping rural economies across Europe. Innovation in this context is not limited to the adoption of digital tools; it encompasses a broader rethinking of the agritourism product — how it is designed, delivered, marketed, and experienced.

Digitalization represents the most immediately visible axis of innovation. Online booking platforms — both international (Booking.com, Airbnb) and domestic (Lapensiuni.ro, Travelminit.ro, Directbooking.ro) — have become the primary distribution channels for agritourism accommodation, replacing walk-in and telephone reservations as the default booking mode for urban tourists. Social media marketing, particularly through Instagram and TikTok, has enabled small family guesthouses to develop direct-to-consumer audiences without the cost of traditional advertising. The emergence of digital storytelling, influencer collaborations, and user-generated content has in several cases transformed previously

anonymous rural properties into nationally recognized destinations. A growing number of operators now invest in professional photography, virtual tour content, and multi-language websites to improve their international visibility and conversion rates (Ibric et al., 2025; Pricopoaia et al., 2024).

Experiential innovation is equally important. The traditional Romanian agritourism product — accommodation plus traditional meals plus passive observation of rural life — is being enriched by a widening menu of participatory and educational activities. Gastronomy-centered experiences, including cheese-making workshops, bread-baking lessons, traditional recipe cooking classes, and farm-to-table dinners prepared with the host family, have emerged as powerful differentiators and premium revenue generators. Craft and artisan experiences — pottery, weaving, woodcarving, and natural dyeing — connect visitors to regional material cultures that are disappearing from everyday life, creating an authenticity premium that supports higher accommodation rates. Api-tourism (beekeeping experiences) and wine tourism, now increasingly developed in regions beyond the traditional Dealu Mare and Cotnari circuits, are expanding the activity portfolio available to Romanian agritourists (Antonie, 2024; Gurgu and Fintineru, 2025).

Sustainability-driven innovation is gaining traction, partly in response to European funding requirements and partly due to genuine market demand from an environmentally aware tourist segment. An increasing number of guesthouses seek certification from the Romanian Ecotourism Association (AER) or align their operations with principles of ecological management: use of renewable energy, reduction of food waste, integration of organic production, and promotion of slow-mobility access by bicycle or hiking trail. Local Gastronomic Points (PGL), which reached 702 registered units by 2026, represent an institutional innovation within the sector, providing a legal framework for serving traditional food at household scale and strengthening the direct linkage between tourism and local agricultural production (Chivu and Stanciu, 2024b).

Emerging technologies — augmented reality heritage interpretation, AI-powered recommendation engines, smart home automation in rural guesthouses, and drone-based landscape photography for marketing — are beginning to enter the sector, though their adoption remains concentrated among the most advanced operators and in regions with the strongest digital infrastructure. Romania's persistent lag in digital skills and rural broadband quality, despite performing well in fixed connectivity, continues to constrain the pace of technological diffusion across the wider sector (European Commission, 2025; Stancioiu and Ionica, 2025).

New Demand Segments

The demand base for Romanian agritourism is evolving beyond its traditional core of domestic middle-income families, with several new and growing segments now reshaping the sector's commercial opportunity. Understanding these segments is critical for operators seeking to escape the commodity trap of the 3-daisy weekend-break market.

The international tourist segment remains the most underdeveloped relative to its potential. In 2025, foreign visitors accounted for only 6.4% of agritourism demand in Romania, compared to 18.4% across all Romanian tourism — an enormous gap that reflects both a marketing deficit and a structural accessibility problem. However, the profile of the foreign visitors who do reach Romanian agritourism units is highly encouraging: they are concentrated in premium 4 and 5-

daisy properties, exhibit longer lengths of stay, and generate higher per-visit revenues than domestic tourists. European source markets — Germany, the Netherlands, France, and the United Kingdom — show strong alignment with the values that Romanian agritourism can authentically offer: genuine food, unhurried rural life, cultural depth, and natural beauty. The 51.7% increase in foreign arrivals to premium units recorded even during the broader sector decline of 2025 signals significant latent demand that an organized international marketing effort could rapidly activate.

Generation Z and younger Millennial travelers (those aged 18–35 in 2025) represent a growing and strategically important segment. Research confirms that this group prioritizes experiences over destinations, values social media-shareable authenticity, and shows strong interest in sustainability and local culture (Accor, 2025; Tanase et al., 2023). Romanian agritourism is inherently positioned to capture this segment, yet currently fails to communicate its offer in the language and through the channels that Generation Z uses. The aesthetic qualities of traditional Romanian rural architecture, the visual appeal of handcrafted foods and folk customs, and the narrative richness of regions like Maramures and Bucovina are precisely the kinds of distinctive, Instagram-worthy content that drive aspirational travel among younger urban consumers. Converting aesthetic interest into actual bookings requires deliberate investment in content strategy, partnership with travel influencers, and frictionless mobile booking experiences.

The digital nomad segment, while numerically modest today, offers substantial mid-week occupancy potential. The post-pandemic normalization of remote working has created a large and growing population of location-independent professionals who combine extended rural stays with productive working time. Romanian agritourism guesthouses in attractive natural settings — particularly in mountain regions with reliable high-speed internet — are well-positioned to offer digital nomad packages that combine accommodation, workspace, meals, and weekend experiential activities. Such packages could structurally address the sector's most damaging weakness: the near-zero mid-week occupancy that leaves the average agritourism unit generating revenue on fewer than 52 nights per year.

Wellness and therapeutic tourism is an expanding global trend that aligns naturally with the rural Romanian offer. The combination of clean air, uncontaminated food, physical activity in natural landscapes, and psychological decompression from urban life constitutes an informal wellness offer that already motivates many agritourism visits. Formalizing and communicating this wellness dimension — through spa facilities, forest bathing programs, yoga retreats, therapeutic apitherapy experiences, or supervised agricultural physical activities — would allow Romanian guesthouses to address the growing market for health-oriented rural escapes and support longer stays during the shoulder and winter seasons.

Educational and school tourism is another emerging segment, driven by growing parental and institutional concern about children's disconnection from food production, agriculture, and natural environments. A number of Romanian agritourism operators have already developed structured educational programs for school groups that combine curriculum-linked learning with farm activities. This segment offers the distinct commercial advantage of generating off-peak weekday occupancy — the single most urgent challenge for the sector's financial sustainability — while simultaneously fulfilling a genuine social need and building future demand by introducing a new generation to the pleasures of rural tourism.

5.3 Potential Growth Scenarios

Three structurally distinct growth scenarios can be identified for Romanian agritourism over the 2025-2035 period, reflecting different combinations of policy ambition, investment capacity, and market evolution.

The Stagnation Scenario assumes continuity of current structural weaknesses: concentrated geographic supply, dominant 3-daisy mass segment, minimal internationalization, declining domestic purchasing power, and absence of coordinated public marketing. Under this scenario, the sector continues to contract as the 2025 demand shock becomes structurally embedded, with annual arrivals stabilizing around 950,000-1,000,000 by 2028 and average occupancy rates declining below 12%. The most vulnerable operators — those dependent on the single domestic weekend-break segment and lacking digital presence — progressively exit the market, concentrating supply further in the established hubs and deepening regional disparities. This scenario requires no change from current trajectories and represents the default outcome of policy inaction.

The Differentiation and Internationalization Scenario assumes a deliberate strategic pivot by a significant share of operators and supporting institutions: upgrading of accommodation to 4-5 daisy standards, active development of experiential and thematic products (gastronomy, wellness, heritage, educational tourism), and a serious investment in multilingual digital marketing and international distribution partnerships. Under this scenario, the sector could recover demand losses by 2027, reach 1.3 million annual arrivals by 2030, and increase the international visitor share to 15-18%. Average RevPAR (revenue per available room) could increase significantly as the premium segment expands and mid-week occupancy improves through digital nomad and wellness packages. This scenario is achievable within current European funding frameworks but requires coordinated industry leadership and sustained institutional commitment.

The Transformational Scenario assumes that Romania succeeds in repositioning its rural territory as a world-class agritourism destination, comparable to Tuscany, the French Dordogne, or the Austrian Salzkammergut — regions that have successfully combined authentic agricultural heritage, premium hospitality, and sophisticated international marketing. Under this scenario, agritourism becomes a primary rather than secondary tourism motivation for international visitors, supported by targeted investments in rural accessibility infrastructure, active cultivation of UNESCO and international heritage recognition for Romanian rural landscapes, and deep integration of the agritourism sector with premium food export brands and European slow-tourism networks. Annual arrivals could reach 1.8-2.0 million by 2035, with a substantially increased international share of 25-30% and an average stay duration approaching 3 nights. This scenario requires systemic policy commitment, long-term investment horizons, and a degree of public-private coordination that would represent a genuine departure from current practices in Romanian rural development.

Conclusions and Recommendations

Summary of Results

This market research has provided a comprehensive analysis of the Romanian agritourism sector across its demand, supply, environmental, sustainability, and trend dimensions. The principal findings that emerge from this investigation can be synthesized as follows.

Romanian agritourism has achieved genuine scale — over 3,668 registered accommodation units, more than 61,000 bed places, and historically over 1.1 million annual arrivals — making it the largest single accommodation category in the national tourism system. However, the sector's 2025 performance data reveal acute structural vulnerabilities: a 10.9% decline in arrivals, contraction to 1.09 million tourists, and an average net accommodation utilization rate that remains critically low. This contraction occurred against a backdrop of only modest overall national tourism decline (-2.1%), confirming that agritourism is disproportionately sensitive to the deterioration of domestic purchasing power.

The geographic concentration of the sector is extreme. Braşov, Maramureş, Suceava, Tulcea, Harghita, Cluj, and Bihor together account for the majority of agritourism capacity, while the extensive southern and eastern plains of Romania remain almost entirely disconnected from rural tourism revenue flows. This territorial imbalance not only limits the sector's aggregate size but exposes it to the risks of hyper-competition and authenticity dilution in saturated destinations, while leaving vast cultural and landscape resources underutilized in peripheral regions.

The demand profile remains heavily domestic, strongly seasonal, and concentrated in the weekend-break pattern. Foreign tourists account for just 6.4% of arrivals, far below the national average of 18.4%, yet their premium concentration and the 51.7% growth recorded in high-classification units during 2025 signal unrealized commercial potential. Visitor motivations — nature escape, traditional food, cultural authenticity, and family bonding — are well-matched to Romania's genuine rural offer, and satisfaction levels are consistently high. However, the prevailing product model of basic accommodation plus traditional meals is insufficiently differentiated to sustain premium pricing or extended stays.

The supply side is characterized by small family-operated units with moderate to low digitalization, limited marketing investment, and structural dependence on European funding for modernization. The premium segment (4-5 daisies) shows growth potential and resilience, while the mass 3-daisy segment faces intensifying commodity competition and declining margins. Professionalization gaps in hospitality management, digital skills, and foreign language competency continue to limit the sector's ability to capture international demand.

Strategic Recommendations

On the basis of this research, the following strategic recommendations are proposed for agritourism operators, industry associations, and public authorities.

For operators, the most urgent priority is product and quality upgrading. The business model of the basic 3-daisy weekend unit is no longer commercially sustainable in an environment of declining domestic purchasing power and increasing competition. Capital investment should be directed toward upgrading accommodation to 4 and 5-daisy standards, with particular emphasis on wellness facilities (saunas, massage rooms, thermal baths) that generate shoulder-season and mid-week demand and support longer average stays. Simultaneously, operators should systematically develop experiential products beyond the accommodation-and-meal core: gastronomic workshops, guided heritage experiences, active outdoor programming, and educational packages for school groups. These experiences both increase revenue per guest and generate the distinctive content needed for effective social media marketing.

Digital transformation must be treated as a strategic imperative rather than an optional addition. Every agritourism operator should maintain an active presence on at least two booking

platforms (including at least one with significant international reach), operate social media accounts with regular content in both Romanian and English, and invest in professional visual content — photography and video — that accurately represents the authentic appeal of the property. Partnership with specialized rural tourism content creators and travel influencers who have authentic relationships with nature-and-culture oriented audiences offers a cost-effective route to new market reach, particularly among younger domestic and European visitors.

Addressing seasonality requires structural product innovation. Mid-week occupancy can be stimulated by offering remote work packages at competitive weekly rates for digital nomads, corporate wellness retreats for small and medium enterprises, and themed long-weekend packages around gastronomic festivals, harvest seasons, or winter folk traditions. Reducing dependence on the August peak requires developing winter experiences that are genuinely compelling and specific to the Romanian rural context: sleigh rides, ice fishing, traditional Christmas crafts, and New Year celebrations in heritage villages.

Internationalization should be treated as a sector-wide strategic priority. Individual operators cannot effectively reach international markets independently; a collective promotional effort is essential. This requires coordinated investment in multilingual digital platforms, participation in international rural tourism fairs and slow-food networks, development of thematic itineraries connecting multiple operators across regions, and active cultivation of relationships with incoming tour operators specializing in cultural, culinary, and sustainable travel. The development of clearly differentiated regional brands — beyond the existing Maramures, Bucovina, and Bran-Moieciu circuits — for less-known territories with genuine agritourism potential (the Apuseni Mountains, Oltenia, the Banat border region) would expand the sectoral offer and reduce geographic concentration risks.

Territorial expansion into currently underdeveloped agritourism regions — particularly the sub-Carpathian corridors of Muntenia and Oltenia, the Danube floodplain, and the ethnographically rich areas of the Banat and eastern Moldavia — should be actively supported through targeted investment incentives, dedicated technical assistance for new entrants, and infrastructure improvements in road connectivity and broadband access. These regions possess authentic cultural and natural resources but lack the critical mass of accommodation and marketing capacity needed to generate self-sustaining visitor flows.

Design of Agritourism Support Programs

The design of effective agritourism support programs requires moving beyond generic rural development funding toward instruments specifically calibrated to the particular needs and constraints of the agritourism sector. The following program frameworks are proposed.

A National Agritourism Quality Upgrade Program should provide targeted grant support — financed through the National Strategic Plan 2023-2027 and successor frameworks — for the physical upgrading of existing agritourism guesthouses to 4 and 5-daisy classification standards. Eligible investments should include wellness facility installation, dining room expansion and kitchen professionalization, accessibility infrastructure, energy efficiency improvements and renewable energy systems, and digital infrastructure. The program should incorporate a streamlined application process specifically designed for small family enterprises with limited administrative capacity, differentiating it from the standard EU project bureaucracy that currently deters many potential applicants.

A Romanian Rural Tourism Digital Acceleration Initiative should provide subsidized access to digital marketing tools, professional photography services, multilingual website development, and social media management training for agritourism operators who currently lack the skills or resources to establish an effective online presence. The program should be delivered through a network of rural enterprise support centers co-located with AFIR regional offices and should include peer-mentoring between digitally advanced operators and those beginning their digital transformation journey. Particular attention should be given to the development of a unified national agritourism digital platform — a Romania-specific rural booking and discovery portal — that aggregates the dispersed offer of thousands of small operators under a single internationally visible brand.

A Rural Experience and Authenticity Development Program should support the creation and commercialization of experiential products that deepen the agritourism offer beyond basic accommodation: gastronomic workshops and farm-to-table experiences, heritage interpretation programs, artisan craft demonstrations, nature-guided experiences, and educational farm visits for school groups. This program should co-finance the development of safety-certified activity infrastructure, the training of operators in experience facilitation, and the development of coherent thematic itineraries at the local and regional level. Partnerships with agricultural universities, culinary schools, and folk arts institutions should be actively encouraged to ensure the professional quality and cultural accuracy of the experiences developed.

A Territorial Agritourism Clustering Program should support the formation of local agritourism clusters — geographic groupings of five to twenty operators who collaborate on joint marketing, shared service provision, common quality standards, and coordinated experience design. International evidence from Italy's Agriturismo network, the French Bienvenue à la Ferme circuit, and the Spanish Agritourism associations demonstrates that clustering is the primary mechanism through which individual family farms achieve the scale and professionalism needed to market effectively to domestic and international visitors. Clusters should be eligible for collective investment grants, joint digital marketing budgets, and facilitated participation in international tourism fairs. Public support for the formation and early-stage management of clusters through LEADER local action groups offers a particularly appropriate institutional framework given the territorial and community-based character of the agritourism sector.

Finally, a Monitoring and Intelligence Program should ensure that the sector benefits from systematic, real-time data on demand trends, supply characteristics, pricing dynamics, tourist satisfaction, and competitive positioning relative to peer countries. The current quality and timeliness of Romanian agritourism statistics — based on monthly INS accommodation returns — is insufficient to support responsive business and policy decisions. Investment in a dedicated agritourism observatory, linked to National Statistic Institute, the National Tourism Authority/ Ministry of Tourism, and AFIR, would provide the analytical foundation needed for evidence-based sector management and would significantly reduce the information gap that currently disadvantages Romanian agritourism operators relative to their European peers.



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MARKET RESEARCH ON AGRITOURISM IN SPAIN

Introduction

The tourism sector constitutes one of the fundamental pillars of the Spanish economy, positioning Spain as one of the leading destinations worldwide. In this context, tourism has progressively evolved towards more sustainable, diversified, and experience-oriented models, leading to the rise of alternative modalities such as rural tourism and, closely related to it, agritourism.

Agritourism, understood as tourism activity carried out on working agricultural farms, falls within the scope of rural tourism and represents a growing segment within the Spanish tourism market. Although official statistics do not always specifically disaggregate agritourism, its evolution can be approximated through rural tourism data. In this regard, the sector has reached significant figures in recent years: in 2024, more than 4.5 million travelers chose rural accommodation in Spain (INE, 2025), representing an approximate increase of 11% compared to the previous year, while overnight stays exceeded 12 million. These figures reflect the consolidation of this segment within the national tourism system.

Likewise, according to these same official data, rural tourism shows sustained growth dynamics, although with certain fluctuations. For example, overnight stays in rural accommodations recorded a slight increase of 0.4% in 2024, mainly driven by the growth of international tourism, which increased by more than 10%. This highlights a progressive internationalization of rural tourism—and, by extension, agritourism—which has traditionally been linked to domestic demand.

In terms of relevance within the tourism system, rural tourism occupies a significant position, especially in certain inland regions. In regions such as Castilla y León, Castilla-La Mancha, or Extremadura, this type of accommodation represents around 15% of total overnight stays, ranking as the second most important modality after hotels. This relative weight underlines its importance as a tool for tourism diversification and territorial development.

From a supply perspective, Spain has a broad infrastructure linked to rural tourism. It is estimated that there are more than 18,000 rural accommodations in the country, reflecting a consolidated network of establishments capable of integrating agritourism experiences. In addition, the sector has a significant capacity to generate employment and economic activity in rural areas, contributing to population retention and the revitalization of territories affected by depopulation processes.

The recent behavior of the sector also shows signs of resilience and adaptation. According to data from the National Statistics Institute (INE), overnight stays in rural accommodations increased by 24% in January 2026 compared to the same month of the previous year, indicating a significant recovery in certain periods. However, seasonal and cyclical fluctuations are also observed, with occasional declines in some months, highlighting the need for strategies focused on reducing seasonality and diversification.

At the same time, the Spanish tourism sector as a whole continues to show strong economic dynamism. For example, international tourist spending reached €7.805 billion in January 2026, with average spending per tourist exceeding €1,500, demonstrating the sector's high potential

for value generation. This macroeconomic context favors the development of specialized segments such as agritourism, especially those focused on higher value-added experiences.

Regarding territorial distribution, some autonomous communities stand out as leading rural tourism destinations. Castilla y León, for example, recorded around 1.9 million overnight stays in 2024, consolidating its position as one of the main destinations in the country. Likewise, regions such as Andalusia have reached occupancy levels close to 60% during certain periods, reflecting growing and sustained demand.

In this context, agritourism emerges as a strategic tool for sustainable rural development, contributing to the generation of additional income for agricultural farms, the enhancement of natural and cultural heritage, and the diversification of the rural economy. However, the sector also faces relevant challenges, such as the need for professionalization, digitalization of the offer, and adaptation to new market demands.

This market research study aims to analyze the agritourism sector in Spain in depth, evaluating its current situation, recent evolution, and future prospects. Through this analysis, the objective is to provide a solid basis for strategic decision-making by companies, investors, and public administrations interested in this growing segment.

In conclusion, agritourism represents a significant opportunity to align tourism development with the principles of sustainability, innovation, and territorial balance, consolidating itself as a key component of the future of tourism in Spain.

Demand Analysis

The analysis of demand in the agritourism sector requires, first and foremost, a key methodological clarification: the official statistical data provided in Spain does not disaggregate agritourism information from the wider category of rural tourism accommodation (EOAT-Rural Tourism), as recorded by the National Statistics Institute (INE, Instituto Nacional de Estadística). This structural limitation is inherent to Spain's tourism accommodation registration system. As a result, it is not possible to obtain precise figures for visitors, overnight stays, or average length of stay exclusively attributable to this modality from the official sources currently available.

Given this constraint, the present section constructs the agritourism consumer profile through a triangulation of complementary sources: the data from the INE's Survey on Occupancy in Extra-Hotel Tourist Accommodation for Rural Tourism in its most recent edition (2025 data, published on 2 February 2026), the Rural Tourism Observatory jointly produced by EscapadaRural, CETT-UB and Netquest (RTO, 2024), and the recently published specialist academic literature on the profile and motivations of the agritourism in Spain (Ruiz Morales et al., 2024; Sánchez-Martín et al., 2024; Sánchez-Oro et al., 2024). Data from rural tourism as a whole serve as the primary structural reference, given that agritourism constitutes a specific — and qualitatively distinct — modality within that broader universe. It is also complemented by the empirical findings of quantitative studies on agritourism demand carried out across different Spanish regions. Although this methodological approach calls for caution in the extrapolation of results, it nonetheless allows for a sufficiently well-grounded characterisation of the typical consumer in this sector.

Sociodemographic Profile of the Tourist

The agritourism or rural tourist in Spain is mainly a domestic one. According to INE's Survey on Occupancy in Rural Tourism Accommodation for 2025 —the most up-to-date data available— from a total of 4,787,999 visitors recorded in establishments of rural tourism accommodations, Spanish residents accounted for 3,615,735 (75.5%) (INE, 2026a). This still represents almost constant throughout the recent historical series, which clearly reflects the domestic nature of this market. In 2024, national tourists were also predominant: they accounted for 3,569,026 of the total 4,773,632 visitors (INE, 2025). This essentially domestic market profile differentiates it from the other tourism typologies, such as coastal or urban, where the presence of international visitors is significantly more substantial.

Geographic proximity is one of the most characterizing features of the rural landscape and agritourist in Spain. In territories such as Catalonia, the Valencian Community, Andalusia and in the Community of Madrid, most of rural overnight stays done by national tourists belong to those who travel from their autonomous community, which confirms a high rate short-radius tourism consumption. Such behaviours for proximity follow the logic of small, recurring getaways from metropolitan areas to peripheral or simply adjacent rural contexts, where road access is not a significant limitation and soil diversity is accessible thanks to a great supply of diversified products and growing social recognition of heritage and natural environments. By contrast, destinations like Cantabria, the Principality of Asturias and La Rioja perform as inter-regional attractiveness destinations attracting tourists coming from other autonomous communities to search for unique rural experiences not existing into their home territories (INE, 2026b).

With respect to the composition of groups, the research available regarding the profile of agritourist in Spain highlights that families with children will be the largest segment. The international study on rural tourism conducted by Andalucía Lab (2023) identifies family and couple travel — with or without children — as the most frequent travel patterns, with the average visitor age falling within the 35–64 age bracket. This is, therefore, an adult profile in the child-rearing or post-rearing phase, with sufficient economic capacity to cover accommodation and activity costs, and with motivations combining active leisure, the transmission of values to younger generations, and an interest in natural and cultural heritage.

In the specific domain of agritourism, the research of Ruiz Morales et al. (2024) —based on 753 surveys of tourists engaging in agritourism activities linked to extensive livestock farming in Andalusia— reveals a visitor profile characterised by high educational attainment, explicit environmental sensitivity, and a willingness to pay for differentiated activities. Sánchez-Martín et al. (2024) further note, in their analysis of agritourism demand in Extremadura, that perceptions of agritourism vary according to the visitor's age and degree of prior rural experience: older segments with previous experience in rural settings tend to place particular value on the heritage and landscape component — especially agrosylvopastoral landscapes such as the *dehesa* — while younger visitors show a greater interest in experiential and learning-based content linked to agricultural production processes. This internal segmentation of the agritourism market has direct implications for product design and the differentiated communication of value propositions.

In terms of territorial distribution of demand, Castilla y León consolidated its historic leadership as Spain's primary rural tourism destination in 2025, with 816,350 visitors and 1.8 million overnight stays — albeit with a 5.9% decline compared to the record figure of 2024 — followed by the Balearic Islands, Catalonia and Andalusia as high-demand destinations (INE, 2026a). International tourist arrivals showed a slight contraction in 2025, with foreign visitors declining by 2.7%, to 1,172,263, partly as a result of demand redistribution towards other extra-hotel accommodation typologies. Nevertheless, international demand for rural Spain records a solid medium-term growth trajectory (+13.53% in 2024 and +10.7% in 2023), reflecting growing interest among Central and Northern European markets in rural and agritourism products in Spain, particularly among visitors from Germany, the Netherlands and the Scandinavian countries (INE, 2025; 2026a).

Motivations and Expectations

The motivations driving the choice of agritourism as a travel modality respond to a multidimensional logic that goes well beyond simple rest and relaxation. The research of Ruiz Morales et al. (2024) demonstrates that agritourists, even those with low or moderate knowledge of agricultural systems, display a strongly positive perception of their attributes and declare themselves highly motivated by the proposed activities. The most appealing activities are workshops linked to artisan production derived from livestock farming — cheese-making, wool and leather crafts — which underscores that the experiential learning component is the primary driver of specific agritourism demand. This outcome is consistent with the findings of Baby and Kim (2024), who, using 615 agritourists and structural equation modelling, showed that visitor motivations intrinsic to visitors — defined as genuine motivation intentions related to nature, sustainability and rural productive systems — were the most important predictors of destination satisfaction and revisit intention. This motivational factor mediates the relationship between tourists' environmental behaviour and aggregate satisfaction, implying that agritourists are not merely after a leisure experience but rather an experienced realisation of their human ideals about sustainability and nature-relatedness.

The ethical and experiential quality of agritourism motivation justifies categorising the consumer of this sector as distinctly different to the generality of rural tourism users. While the typical rural tourist may be centred on rest or naturephilia pleasures, one agritourist is attracted to contact with agrarian productive processes learning about traditional agriculture practice, proximity gastronomy and local community life participation. The added dimension is arguably the most strategically important one in terms of product design and in terms of the communication of the agritourism offer: the simple presence of a pleasant nature is not sufficient since this segment of demand requires active, real proposals with formative content.

Within the broader framework of rural tourism, the Rural Tourism Observatory provides longitudinal data of great relevance for contextualising demand. Its 2023 figures reveal a notable reconfiguration in the motivational hierarchy of the Spanish rural tourist: the dominant motivation is currently the desire to discover villages and local traditions (37% of respondents), ahead of the search for disconnection and escape from daily routine (14%) and the possibility of making frequent getaways throughout the year (12%) (RTO, 2024). This shift towards cultural and experiential motivations — which contrasts with the historical primacy of seeking isolation

and tranquility — is consistent with the post-pandemic revalorisation of rural and agri-food heritage observed in tourist behaviour across Europe.

From a theoretical perspective, Sánchez-Oro, Robina-Ramírez, Portillo-Fernández and Jiménez-Naranjo (2024) developed, on the basis of 6,106 interviews with visitors to south-western Spain, an explanatory model of tourist motivations and expectations anchored in Maslow's hierarchy of needs. Their results demonstrate that the visitor's socioeconomic conditions significantly modulate their motivation: tourists with higher cultural and economic capital tend to orient themselves towards self-actualisation needs — learning, discovery, authentic contact with rural culture — while segments with lower economic resources priorities motivations associated with safety, rest and value for money. The quality of the experience acts, in all cases, as the central mediating variable in the construction of the bond between visitor and rural destination.

With regard to prior expectations, the available studies consistently indicate that the agritourist and rural tourist particularly value the accuracy and comprehensiveness of information about the establishment and its surroundings — including photographs, reviews from other visitors and detailed descriptions of available activities — value for money, and the existence of a diverse and authentic complementary offer at the destination (Andalucía Lab, 2023). Sánchez-Martín et al. (2024) further note that rural accommodation owners in Extremadura perceive the integration of agrarian landscapes and productive activities as the primary differentiating factor of their offer relative to other forms of rural tourism, thereby underscoring the alignment between visitor expectations and the differentiating potential of the agritourism product.

Consumer Behaviour and Expenditure

The consumption pattern of the agritourist and rural tourist is characterised by short stays concentrated in the holiday period and, most notably, at weekends and public holidays. According to the EOAT, the average length of stay in rural tourism accommodation was 2.69 nights in 2025 — a slight increase of 1.65% compared to 2024 — and 2.65 nights in 2024 (INE, 2025; 2026a). The most common duration for these short breaks is two nights, coinciding predominantly with the weekend. These figures are consistent with those of the Rural Tourism Observatory, which puts the average stay at 2.8 nights across Spanish rural tourism in 2023 (RTO, 2024), and with the general pattern of a market that functions, to a large extent, as a release valve from urban routine rather than as a long-holiday destination.

The temporal distribution of demand continues to display marked seasonality, albeit with progressive signs of de-seasonalisation worth highlighting. In 2025 there were on average an annual occupancy rate by places of 21.60%, 4.61% higher than in 2024 (INE, 2026a). Even if strengthening off-peak demand —driven by the ongoing popularity of flexible working practices and greater scheduling flexibility for some passenger types— continues to narrow the factors which influence seasonality, the weekend–weekday occupancy gap remains considerable. In this context, the key is that agritourism can find structural advantages in offering activities according to the agricultural calendar (outside of summer periods — grape harvests, olive harvesting, traditional pig slaughter festivals, transhumance).

Rural accommodation supply averages 161,849 places estimated at 16,288 accommodation establishments in rural areas (INE, 2026a), which meant a loss of -2.56% compared to the

previous year for 2025. This contraction of the accommodation stock together with the growth in occupancy rates indicates a process of consolidation and adjustment within the business fabric of the sector, in which at establishments with less efficient or poorly positioned businesses are losing ground to those that have committed to differentiation, digitalisation and improvements in the visitor experience

In terms of expenditure, the Rural Tourism Observatory puts the average spending of the rural tourist at 91 euros per person per day in 2024, representing an increase of 8.3% compared to the 84 euros recorded in 2023 (RTO, 2024; 2025). Of that total, 32 euros correspond to accommodation expenditure per person per night — up from 30 euros the previous year — and the remaining 59 euros are distributed across on-destination consumption: 58% is directed to restaurants, 23% to the purchase of local and artisan products, and 18% to leisure activities (RTO, 2025). Compared to 2023 figures — when local products absorbed 28% of on-destination spending and leisure activities 15% — this reveals a recomposition of the consumption structure in which the experiential component is steadily gaining ground. Nevertheless, the purchase of local agri-food products remains the second largest item of on-destination expenditure, making the agritourist a direct agent of dynamisation for local value chains and short distribution circuits: local agricultural producers, artisan agri-food processing businesses and active leisure providers are all direct beneficiaries of visitor expenditure at the destination.

From a macroeconomic perspective, CaixaBank Research (2023) analysis of card payment data reveals that rural tourism's share of total tourist expenditure in Spain rose from 10.9% in 2019 to 11.9% in 2023, a market share gain that reflects a structural shift in tourist consumption preferences. Domestic tourists are the primary catalyst behind this growth, representing approximately 73% of rural tourist spend as opposed to international visitors at 27%. Rural tourism is even more domestic in nature: the foreign share of total tourism spending on the coast is nearly 70%, while for cities foreigners account for about 40%. In addition, the analysis observes that monthly rural tourist spending growth in every month of 2022 and the first half of 2023 has outstripped coastal and urban tourism, confirming that the shift in consumption preferences resulting from the pandemic has not been transitory but a structural change towards "nature tourism" (CaixaBank Research, 2023).

That an ongoing rise in prices embodies a vital tool for analysis to comprehend clearance of spending in the field. In the extra-hotel sector, the Rural Tourism Accommodation Price Index (RTAP) recorded the largest increase in 2025, with an average rise of 8.8%, with similar trends in both weekend and weekday rates (INE, 2026a). After a slight decline in visitors and modest growth in overnight stays, this price inflation is indicative of a market maturation process, where extensive growth gets replaced by higher value added per stay model whereby establishments increasingly orient themselves to demand segments with higher spending power and higher willingness-to-pay for differentiated quality experiences.

Satisfaction Levels and Loyalty

Tourist satisfaction is very high among visitors who choose rural tourism and agritourism in Spain, and it represents one of the strengths of this type of tourism compared to other typologies. For its part, the Rural Tourism Observatory reveals that 92% of tourists who made at least one rural getaway in 2023 want to repeat in 2024 and that this predisposition rate is ten

percentage points higher than that registered the previous year. For those in this group, 60% intended to make two to three rural trips during 2024 and a further 32% intend making more than three so presenting a typical customer profile that visits regularly (i.e. approximately once every ~4 months) (RTO, 2024). These indicators form one of the most powerful behavioural loyalty indices in all of Spanish tourism.

The intrinsic features of the agritourism product contribute to explaining this high loyalty: authenticity, setting, customisation service and genuine disconnection from urban rhythms create an experiential value that little or nothing can be desired from more standardised offerings. Compounding this is the impact of social recommendation —happy tourists often not only return but also become advocates for the destination in their social circles, thus lowering customer acquisition costs and aiding a sustainable long-term business model.

Academic literature also evidences a good explanatory framework on the mechanisms producing this loyalty. Interestingly, Baby and Kim (2024) showed that satisfaction with the agritourism destination fully mediates the influence of intrinsic motivation on intentions to return, thus confirming that subjective experience quality rather than objective establishment attributes is best predictor of behavioural loyalty. Likewise, López-Sanz et al. (2021), after conducting an analysis of 1,658 valid rural tourist questionnaires from the province of Soria (Spain), proved through structural equation modelling that loyalty is most affected by image and satisfaction variables whose effect on return intention was mediated by overall satisfaction as its strongest antecedent and immediate direct precursor of destination image. The causal relations have obvious practical consequences: destination management perception before, during and after the visit — via digital channels, review platforms or social media presence — turns out to be a central strategic lever for fortifying repetition demand in the industry.

However, Spanish agritourism loyalty consolidation is never without challenges. The share of overnight stays in extra-hotel accommodation attributable to rural tourism accommodation was 8.8% in 2025, while tourist apartments had a higher share (52.1%) and remain the leading typology within the segment, indicating that the growth experienced by other types of accommodation is putting pressure on rural demand (INE, 2026a).

Sánchez-Martín et al. (2024) mention that this challenge in agritourism is outside the activity area and, thus, sustainable loyalty can only be achieved through continuous renewal of the experiential value proposition and deeper engagement of the visitor into productive and cultural dynamics characteristic of agrarian territory that also avoids product homogenization, losing authenticity factors that distinguish agri-products.

Sánchez-Oro et al. (2024) complement this argument by indicating that satisfaction with the rural tourism experience is not an automatic process dependent only on destination attributes but rather a summed expression of the visitor's cultural capital and his/her prior expectations; in this view loyalty cannot be regarded as a passive outcome of one satisfactory visit, but instead as output of continuously and actively governed relationship between tourist and territory. This view, which incorporates the relational component of tourism into the demand analysis, is especially relevant for agritourism —a market where the personal relationship between guest and agricultural producer becomes (in itself) an aspect of differentiation and value.

Supply Analysis

As with the analysis of demand, the study of agritourism supply in Spain must begin with a significant methodological limitation: there is no official statistical category that allows for the precise identification and quantification of the universe of specifically agritourism establishments. The National Classification of Economic Activities (CNAE) does not classify agritourism as a distinct activity, which necessitates, once again, a triangulation of sources: data from the INE's Survey of Occupancy in Rural Tourism Accommodations in its most recent edition (fiscal year 2025, published on February 2, 2026), the Rural Tourism Observatory (OTR, 2024), and specialized academic and sectoral literature. In this context, rural tourism as a whole serves as a structural reference, given that agritourism constitutes a sub-segment integrated within it, although not statistically isolatable.

Types of Agricultural Holdings and Services

Spain's agritourism offerings are characterized by notable structural heterogeneity, both in terms of the nature of the farms and the variety of services they make available to visitors. The most comprehensive source available at the national level is the Agricultural Census, whose 2020 edition recorded a total of 16,175 farms that reported engaging in some other profit-making activity directly related to the farm (OALR); of these, 18% were engaged in the tourism sector (MAPA, 2023; INE, 2020). If this data is taken as a reference, the estimated number of establishments engaged in specifically agritourism activities in Spain would presumably fall between 2,000 and 3,000, a range that is difficult to pinpoint without a specific statistical registry (MAPA, 2023). This quantitative uncertainty is a reflection of the sector's main structural problem: the absence of a statistical category that allows for its rigorous identification and monitoring (Sánchez-Martín et al., 2024). The 2016 Survey on the Structure of Agricultural Holdings (EEA2016) recorded 15,239 holdings with OALR, indicating a stable trend with slight growth (MAPA, 2023; INE, 2020). In comparison with Italy—one of the European countries with the longest tradition of agritourism—that country had 25,060 agritourism enterprises in 2020 and 26,360 in 2024 (ISTAT, 2026).

From a typological perspective, Spanish agritourism operations can be grouped into three broad categories based on the degree of integration between agricultural and tourism activities. First, active agricultural operations, where farming, livestock raising, or forestry constitutes the primary economic activity, and tourism serves as a complementary source of income. Second, heritage-based farms, where the tourist appeal lies primarily in the cultural, scenic, or architectural value of the property. Although some agricultural activity may be maintained, it plays a secondary role compared to the historical or aesthetic value of the rural setting. Finally, there are rural diversification initiatives, characterized by a gradual shift away from agricultural and livestock activities toward tourism, which becomes the dominant economic function. Even so, these initiatives retain an identity-based connection to the rural environment through elements such as gastronomy, local traditions, or intangible heritage (Pulido, 2021; Cànoves, Villarino, Priestley, & Blanco, 2004).

Regarding the services offered, the Spanish agritourism model typically centers on rural lodging and dining but incorporates—to a greater or lesser extent depending on the type of operation—experiential activities linked to the agricultural environment. Among the most well-documented

are active participation in agricultural or livestock tasks (milking, harvesting, grape picking, feeding animals), workshops on the production of agri-food products (cheese, jams, olive oil, honey, cured meats), demonstrations of local crafts, visits to production facilities, and activities involving contact with nature or the agricultural landscape (Pulido, 2021). It is precisely this experiential component that constitutes the main distinguishing feature of agritourism compared to other forms of rural tourism, and it is also the one that generates the greatest perceived value for the visitor. Empirical studies such as that by Baby and Kim (2024), based on a sample of 615 agritourism tourists analyzed using structural equation models, demonstrated that the visitor's intrinsic motivation—their genuine interest in nature, sustainability, and rural production processes—is the most significant determinant of both their satisfaction and their intention to return. Consequently, the richness and authenticity of the experiential services catalog constitute not only a differentiating attribute of the offering but also a factor with a direct and quantifiable impact on demand loyalty.

The geographic distribution of the offering is not uniform. In terms of supply volume, the regions with the highest agritourism presence are the Basque Country, Catalonia, the Balearic Islands, and Andalusia; the latter two are driven by their proximity to highly touristed coastal areas and, in the case of Andalusia and Extremadura, by hunting tourism as a complementary activity to large-scale estates (Cors Iglesias, 2020). However, this territorial asymmetry is not solely due to demand factors or natural appeal, but also to the absence of regional regulatory frameworks that recognize agritourism as a distinct category from generic rural tourism, which limits both the professionalization of the sector and its statistical and commercial visibility (Cors Iglesias, 2020; Sánchez-Martín et al., 2024).

Capacity, Prices, and Seasonality

One of the most defining features of Spain's agritourism offerings is their small operational scale. The operations are characterized by a very limited average accommodation capacity, with the predominant model being the microenterprise or family business without salaried staff. This small scale has direct implications for investment capacity, quality management, and marketing opportunities, shaping a business model with narrow margins in which profitability depends critically on the occupancy rate during periods of high demand.

Data provided by the National Institute of Statistics' Rural Tourism Accommodation Occupancy Survey (EOAT) for the 2025 fiscal year offers a primary quantitative reference for contextualizing the supply. The estimated number of rural accommodations stood at 16,288 establishments, with an average supply of 161,849 beds, representing a 2.56% decrease from the previous year and suggesting a trend toward consolidation and rationalization of the business sector (INE, 2026). The average occupancy rate per bed was 21.60%, an increase of 4.61% compared to 2024, while the average length of stay stood at 2.69 nights, with a slight year-over-year increase of 1.65% (INE, 2026). These indicators confirm a trajectory of sustained growth, although they also highlight the persistence of low occupancy rates that hinder the economic viability of many small establishments.

Seasonality is, in fact, one of the sector's main structural challenges. Demand is heavily concentrated in the months of July and August—which account for approximately half of all overnight stays—and during the spring and fall long weekends, leading to capacity constraints

during the high season and high rates of inactivity during the winter months (INE, 2026; OTR, 2024). However, there are early signs of deseasonalization linked to new travel motivations. The diversification of agritourism's value proposition—through products tied to the agricultural calendar, such as grape harvesting, olive picking, or the seasonal production of artisanal goods—is emerging as the strategy with the greatest potential to extend the active season by creating specific reasons to visit during periods of historically low demand (Cànoves et al., 2004; OTR, 2024).

In terms of prices, 2025 saw the largest increase across the entire non-hotel accommodation segment, with the Rural Tourism Accommodation Price Index (IPTR) showing an average rise of 8.85% (INE, 2026). This data points to a maturing market in which extensive growth—the addition of new establishments—is giving way to a model focused on generating greater value per stay. The average expenditure of rural tourists stood at 91 euros per person per day in 2024. This expenditure is 7.6% higher than in 2023 (84 euros per person per day) and is divided between average expenditure on accommodation per person per night (32 euros) and average expenditure per person per day at the destination (59 euros). This spending is directed primarily toward restaurants (58%), but also toward the purchase of local products (23%) and leisure activities (18%) (OTR, 2024). This spending structure highlights the multiplier effect that agritourism generates on the local productive fabric and reinforces the argument that incorporating complementary services not only raises the average price of the establishment but also stimulates the entire rural economy of the surrounding area. Therefore, incorporating differentiated experiential activities can generate greater willingness to pay on the part of the customer, reinforcing the argument that experientialization is a fundamental lever for enhancing the value of the offering (Baby and Kim, 2024).

Marketing Channels

The marketing of agritourism offerings in Spain is structured through a combination of direct and indirect channels, with a growing trend toward digital intermediation that has substantially transformed the sector's distribution architecture over the past decade. However, the degree of commercial sophistication varies considerably depending on the size of the establishment, its geographic location, and the manager's profile.

In the realm of direct channels, personal recommendations—so-called word-of-mouth—and loyalty networks for regular customers continue to play a significant role, especially in small establishments with an established clientele. However, reliance on these informal channels limits the geographic reach of marketing and hinders access to new demand segments, particularly international tourists and younger visitors who exclusively use digital search and booking methods.

In the realm of intermediary channels, digital platforms specializing in rural accommodations are establishing themselves as the primary point of access to offerings for consumers. EscapadaRural, with over 11,000 affiliated accommodations in Spain and more than 30 million annual visits to its website in 2022, and Clubrural, with a broad base of registered rural accommodations, account for a very significant portion of intermediation in the rural segment. Joining these specialized platforms are major online travel agencies (OTAs) with global reach, such as Booking.com and Airbnb, whose penetration in rural tourism has grown steadily over

the past decade. While these platforms offer greater international visibility—particularly relevant in a context where foreign demand grew by 2.29% in 2025, compared to 1.43% for domestic demand and has a solid track record of expansion in the medium term (INE, 2026)—, their ability to communicate the specific characteristics of the agritourism product—its link to agricultural production, its experiential component, and its regional authenticity—is limited compared to specialized platforms.

One growing channel is the integration of agritourism products into themed packages centered on designations of origin, wine routes, olive oil routes, or local culinary itineraries. This form of bundled marketing allows for overcoming the scale limitations of individual establishments, expanding the experiential offerings perceived by visitors, and improving the visibility of the rural destination as a whole (Pulido, 2021). In this regard, the Rural Tourism Observatory reports that the desire to discover local towns and traditions has become the primary motivation for Spanish rural tourists, accounting for 37% (OTR2024). 97% of rural travelers engaged in cultural, gastronomic, or local market, fair, or festive activities, and 90% stated they were willing to pay for them (OTR, 2024). These data confirm the relevance of gastronomic circuits and productive tourism as marketing tools aligned with the new motivations driving rural demand. However, only 40% of property owners report offering activities to their guests—whether managed by themselves, public institutions, or private companies—which indicates significant room for improvement in the development of collaborative products and integrated destination experiences (OTR, 2024).

The analysis by CaixaBank Research (2023) of card payment data provides a relevant macroeconomic context: rural tourism rose from accounting for 10.9% of total tourism spending in Spain in 2019 to 11.9% in 2023, with spending growth in this segment outpacing that of coastal and urban tourism in every month of 2022 and in the first half of 2023. This trend reflects a shift in tourist preferences and a strong case for both specialized and generalist distribution channels to prioritize the visibility of rural and agritourism products in their positioning strategies.

Level of Professionalization and Digitalization

The level of professionalization in Spain's agritourism sector faces significant challenges overall. There is a structural lack of specific training in tourism management among agritourism business owners, most of whom are farmers or ranchers who have incorporated tourism as a secondary activity without formal training in hospitality, marketing, or business management. This training gap manifests itself in deficiencies in customer service, reservation management, the design of tourism products, and commercial communication. For the most part, agritourism establishments in Spain are micro-enterprises or self-employed individuals without salaried staff, which limits both their capacity to provide service and their ability to invest in quality improvements or sustained professionalization processes.

This situation is exacerbated by the fragmentation of the regional regulatory framework, which establishes different licensing and categorization requirements in each autonomous community, hindering the standardization of quality standards at the national level. Sánchez-Martín et al. (2024) note, in their analysis of the state of agritourism in Extremadura, that the absence of a specific regulatory framework—distinct from that applicable to generic rural tourism—limits the recognition of agritourism products by both the government and consumers

and discourages operators from investing in differentiation. Regulatory heterogeneity not only creates confusion in the market but also suppresses incentives for professionalization by failing to establish comparable minimum quality thresholds across regions.

Regarding digitalization, although the sector has made significant progress in recent years, significant disparities persist in the degree of technological adoption. Highly traditional businesses—often managed by older individuals and operating under models rooted in conventional methods—continue to coexist alongside others that have extensively incorporated digital tools into their management, marketing, and customer relations processes. However, the latter remain a minority within the subsector.

Added to this heterogeneity are structural limitations that are particularly relevant in remote rural areas, where deficiencies in connectivity and digital coverage affect both the establishment's operations and the quality of service offered to visitors. While the pandemic acted as a catalyst for digital transformation and highlighted the sector's ability to react, the subsequent pace of digitization has shown signs of slowing down, particularly among micro and small tourism businesses. These businesses face financial barriers, time constraints, and training gaps that hinder the adoption of specific technologies tailored to their business models, highlighting the need for greater efforts in awareness-raising, technical assistance, and institutional support (Ministry of Industry and Tourism & SEGITTUR, 2024).

It is worth noting, however, some positive trends. The growth in the use of social media with visual content—especially Instagram—has opened new channels for direct communication with consumers for establishments with limited resources, by significantly reducing the costs of producing and disseminating branded content. The quality of the tourism experience, interaction with visitors, and satisfaction are key determinants of loyalty and the intention to revisit (Baby and Kim, 2024). In the field of agritourism, elements such as authenticity, experiential learning, and interaction with the rural environment can play a particularly important role in creating memorable experiences and subsequent recommendations of the destination.

In this context, maintaining an active digital presence and providing clear, up-to-date, and visually representative information about the establishment contributes not only to improving commercial visibility but also to strengthening visitor confidence during the trip planning and decision-making phases. Various sectoral studies on rural tourism in Spain also point to the growing importance of digital channels and online reviews in shaping the image and competitiveness of rural destinations (Andalucía Lab, 2023).

Environment and Market Analysis

The analysis of the agritourism environment and market in Spain is situated within a context characterized by the growing relevance of rural and sustainable tourism, as well as the need for economic diversification in the agricultural sector. Within the framework of the Agri&Tour project, this section examines the structural, economic, and regulatory conditions shaping the development of agritourism in Spain, identifying both its limitations and its potential. This analysis is particularly relevant in a country where tourism constitutes a fundamental pillar of

the economy, contributing significantly to GDP and employment (Instituto Nacional de Estadística, 2023; Turespaña, 2023).

The primary epistemological and normative constraint in the Spanish context is the lack of a unified taxonomy that distinguishes agritourism, strictly linked to active farming, from the broader, location-based category of rural tourism. Unlike in other European countries where agritourism represents a clearly differentiated category, in Spain this concept is often subsumed under the broader umbrella of rural tourism. According to national regulations, there is no unified legal definition of “agritourism,” which has resulted in considerable conceptual and operational heterogeneity across regions (Ministerio de Industria, Comercio y Turismo, 2020). This lack of clear delimitation hinders both the collection of statistical data and the design of targeted public policies for the sector.

At the regional level, some regions have developed specific regulations recognizing agritourism as a distinct modality linked to active agricultural holdings, as is the case in the Basque Country, Catalonia, and the Balearic Islands. However, these initiatives coexist with other regions where agritourism is not formally distinguished from rural tourism, resulting in a fragmented regulatory landscape (OECD, 2020). This regulatory decentralization reflects Spain’s distribution of competencies in tourism governance, but it also creates barriers to the consolidation of a cohesive national market.

In Andalusia, the institutional invisibility of agritourism stems from a regulatory framework that subsumes it under generic rural tourism legislation, failing to capitalize on the region’s specific agro-industrial identity and its potential for high-value niche differentiation. Regional regulation, primarily structured through Decree 20/2002 on Rural Tourism and Active Tourism, establishes the foundations for rural accommodation but does not include a specific typology linked to active agricultural holdings. This lack of a specific definition limits the visibility of agritourism as an independent segment, despite the significant weight of the agricultural sector in the region and its potential to generate synergies with tourism activities. Nevertheless, Andalusia presents particularly favorable conditions for the development of this model, given the diversity of its agricultural landscapes, the prominence of activities such as olive cultivation and intensive horticulture, and the growing demand for tourism experiences linked to authenticity, gastronomy, and territory.

From an academic perspective, the literature consistently highlights that agritourism lies at the intersection of agricultural activity and tourism experience, involving the active participation of visitors in activities related to farming or livestock operations (European Commission, 2021). This approach emphasizes the added value of agritourism compared to other forms of rural tourism, as it offers authentic, educational, and place-based experiences. However, the lack of conceptual standardization in Spain complicates comparative analysis and its strategic positioning at the international level.

In this context, this section provides a comprehensive analysis of the agritourism environment and market in Spain, using tools such as PESTLE analysis, competitor analysis, and the identification of entry barriers and opportunities. Through this approach, the aim is to establish a solid analytical foundation to better understand the current dynamics of the sector and to inform future development strategies within the Agri&Tour project.

Political Factors

Agritourism in Spain is strongly conditioned by the political-administrative framework derived from the decentralization of tourism governance, since, according to Article 148.1.18 of the Spanish Constitution, the Autonomous Communities hold exclusive powers in tourism regulation. This has generated significant regulatory heterogeneity across territories, where each region establishes different rules regarding rural accommodation, agritourism activities, classification requirements, and administrative authorization procedures (Melgosa Arcos, 2010). As a result, agritourism operators must adapt to diverse regional legal frameworks depending on the location of their business, directly affecting investment decisions, business planning, and territorial competitiveness.

From the perspective of public policy, agritourism has been promoted as a strategic tool for rural development, particularly in areas affected by depopulation, demographic ageing, and the decline of traditional agricultural activities. Public administrations at both national and regional levels have supported policies aimed at diversifying rural economies, generating complementary employment, and encouraging population retention in rural areas. Law 45/2007 on Sustainable Development of Rural Areas reinforces this approach by considering rural tourism as an instrument for socio-economic revitalization in small municipalities with low population density (Melgosa Arcos, 2010). In addition, European programs such as LEADER have strengthened this political orientation through subsidies and incentives for rural infrastructure rehabilitation and tourism entrepreneurship.

Another relevant political factor is the growing incorporation of sustainability and heritage protection criteria into tourism policy design. Public administrations require rural establishments to respect traditional architecture, landscape integration, and the preservation of natural and cultural heritage, often restricting new construction or structural expansions that may alter the rural environment (Melgosa Arcos, 2010). This policy orientation responds not only to environmental preservation goals but also to a broader strategy of differentiating rural tourism products from mass coastal tourism, reinforcing agritourism as a model associated with authenticity, local identity, and territorial sustainability.

Finally, European policy has also played a decisive role, particularly following Directive 2006/123/EC on services in the internal market. Its transposition into Spanish legislation required the revision of numerous administrative requirements, replacing prior authorizations with declarations of responsibility in many cases and simplifying bureaucratic procedures (Melgosa Arcos, 2010). While this political transformation facilitates easier access to tourism-related activities, it also creates tensions between administrative simplification and the need to preserve quality standards, territorial control, and environmental protection. Consequently, the political environment of agritourism in Spain combines entrepreneurial incentives with strong regulatory intervention aimed at sustainable rural development.

Economic Factors

Agritourism in Spain is closely linked to the economic significance of both the tourism and agricultural sectors, making it a strategic instrument for rural diversification and income generation. Tourism remains one of the main pillars of the Spanish economy, contributing

substantially to GDP and employment, while agriculture continues to play a fundamental role in maintaining rural territories, particularly in inland and less industrialized regions. In this context, agritourism emerges as a complementary economic activity that functions as a financial stabilization mechanism that mitigates the farmer's exposure to commodity price volatility and the structural seasonality inherent in crop and livestock cycles (Sayadi & Calatrava, 2001; Rodríguez & Sánchez, 2022). As Hjalager (1996) and Fleischer and Tchetchik (2005) also suggest, farm diversification into tourism improves economic resilience and strengthens the long-term viability of small and medium-sized agricultural holdings.

From a territorial development perspective, agritourism contributes to the retention of population in rural areas by generating employment opportunities and increasing the added value of local resources. This is particularly relevant in Spain, where many rural areas face structural challenges such as depopulation, ageing populations, and declining agricultural profitability. By integrating accommodation services, gastronomic experiences, farm visits, and the direct sale of local products, agritourism stimulates local economies and reinforces short supply chains, allowing producers to capture a greater share of tourism expenditure (Mahony, 2021; Rodríguez Alonso, 2019). Rodríguez and Sánchez (2022) highlight that given that nearly 25% of visitor expenditure is directed toward food consumption, agritourism serves as a strategic vehicle for 'short supply chain' development, allowing producers to capture a higher percentage of the value added within the territory and supports the economic rationale of agritourism as a high-value niche within rural tourism .

However, the economic development of agritourism in Spain is constrained by several structural limitations, including fragmented supply, small business scale, limited access to investment, and insufficient commercialization channels. Many agritourism initiatives are family-run microenterprises with low financial capacity, which restricts innovation, digitalization, and market positioning. In addition, the absence of a clearly differentiated statistical category for agritourism makes it difficult to measure profitability and attract specific public support. As Moreno Duque (2022) points out, the sustainability of rural tourism models increasingly depends on professionalization and the ability to offer differentiated, experience-based products rather than accommodation alone. Therefore, while agritourism presents significant economic opportunities, its consolidation requires stronger institutional support, better integration between agriculture and tourism policies, and improved access to funding mechanisms such as LEADER programs and European rural development funds.

Social Factors

The social dimension of agritourism in Spain is closely related to changing consumer preferences and the growing demand for authentic, experience-based, and sustainable forms of tourism. In recent years, tourists have increasingly moved away from mass tourism models and have shown greater interest in destinations that offer direct contact with local culture, nature, and traditional ways of life. This shift has been particularly evident after the COVID-19 pandemic, which reinforced preferences for open spaces, smaller-scale destinations, and rural experiences. Agritourism responds to these expectations by allowing visitors to participate in agricultural activities, interact with local communities, and engage with gastronomy and rural heritage in a more meaningful way (Mahony, 2021; Moreno Duque, 2022).

Another relevant social factor is the role of agritourism in preserving rural identity and strengthening social cohesion in territories affected by depopulation and demographic ageing. Many Spanish rural areas face the progressive loss of population, the weakening of traditional knowledge, and the decline of family farming systems. In this context, agritourism contributes not only to economic diversification but also to the social revaluation of rural life, local traditions, and agricultural heritage. Rodríguez and Sánchez (2022) emphasize that agritourism reinforces the connection between tourists and farmers through direct participation, educational experiences, and the transmission of local customs, transforming agriculture into both an economic and cultural resource. This process helps improve the social perception of agricultural work and encourages intergenerational continuity in rural communities.

Furthermore, agritourism is increasingly associated with educational and lifestyle values linked to sustainability, health, and responsible consumption. Visitors are not only seeking leisure but also learning opportunities related to food production, organic farming, biodiversity, and environmental awareness. As Phillip et al. (2010) and Rodríguez Alonso (2019) suggest, authentic agritourism involves more than rural accommodation; it requires active engagement with agricultural processes and local production systems. This educational component strengthens the social value of agritourism and aligns it with broader societal trends toward conscious tourism, healthy lifestyles, and support for local producers. As a result, agritourism becomes both a tourism product and a social tool for reconnecting urban consumers with rural realities.

Technological Factors

Technological development plays an increasingly important role in the competitiveness of agritourism in Spain, particularly through digitalisation, online visibility, and access to booking platforms. Rural tourism businesses, including agritourism farms, must transition toward integrated digital ecosystems, leveraging data analytics and omnichannel strategies to bypass traditional intermediaries and establish direct-to-consumer relationships rooted in territorial authenticity. Digital marketing, online reputation management, and storytelling based on authenticity and local identity have become essential tools for attracting visitors seeking experiential tourism. Recent research on rural tourism in Europe confirms that the digitalisation of the sector has a positive relationship with both the supply of rural accommodation and tourist demand, while the increased use of digital booking platforms does not negatively affect traditional occupancy rates (Alonso et al., 2024).

However, the technological development of agritourism in Spain is still limited by the persistent digital divide affecting many rural areas, especially in inland territories with low population density. Insufficient broadband coverage, weak mobile connectivity, and lower levels of digital skills among small rural entrepreneurs reduce the capacity of agritourism businesses to innovate and compete effectively. Although Spain's Digital Spain Agenda aims to achieve broadband connectivity across 100% of the territory and strengthen SME digitalisation, implementation remains uneven in remote rural areas (Government of Spain, 2024). For agritourism, overcoming these technological barriers is essential not only for commercialisation, but also for improving visitor experience, enabling smart tourism solutions, and supporting the transition toward more sustainable and resilient rural destinations.

Legal Factors

The legal framework of agritourism in Spain is mainly characterized by the absence of a unified national legal definition, which creates significant difficulties for the sector. Unlike other European countries where agritourism is regulated as a distinct category linked to active farms, in Spain it is generally included within the broader concept of rural tourism. As a result, many agritourism businesses are legally registered simply as rural accommodation, which limits their visibility, complicates statistical identification, and hinders the design of specific public support measures (Melgosa Arcos, 2010). This legal ambiguity also makes it difficult to establish clear standards that differentiate authentic agritourism from conventional rural tourism.

In addition, agritourism operators must comply with both tourism regulations and agricultural, environmental, and sanitary legislation, which increases administrative complexity. This dual legal burden is especially challenging for small family farms that combine accommodation services with active agricultural production. Moreover, legal fragmentation among Autonomous Communities creates unequal conditions across regions: while some territories recognize agritourism as a specific legal category, others, such as Andalusia, regulate it only under general rural tourism legislation through Decree 20/2002. This lack of regulatory homogeneity reduces legal certainty and remains one of the main barriers to the consolidation of agritourism in Spain (Rodríguez & Sánchez, 2022).

Environmental Factors

Environmental sustainability is one of the main drivers of agritourism development in Spain, as this tourism model is closely linked to the preservation of landscapes, biodiversity, and traditional agricultural systems. Unlike mass tourism, agritourism is based on low-density activities that promote direct contact with nature, local food production, and the conservation of rural heritage. Rodríguez and Sánchez (2022) highlight that agricultural landscapes themselves become a tourism resource, generating added value while encouraging the protection of ecosystems and cultural landscapes. This is particularly relevant in regions such as Andalusia, where olive groves, vineyards, and other traditional farming systems shape both the environmental identity and the tourism attractiveness of rural areas.

Concurrently, anthropogenic climate change and systemic hydric stress constitute existential threats to the sector, as they compromise the integrity of the agrarian landscape (the primary intangible asset of the agritourism product). Droughts, water scarcity, desertification, and the increasing vulnerability of agricultural production directly affect the viability of farms that support agritourism activities, especially in southern Spain. Sustainable resource management, organic farming practices, and the promotion of local supply chains are therefore essential for ensuring long-term competitiveness. As Rodríguez Alonso (2019) and Mahony (2021) argue, agritourism can function as a tool for environmental education and responsible consumption, helping visitors understand the value of sustainable agriculture while supporting more resilient rural development models.

Sustainability and Impact

Agritourism has become established in recent years as a form of tourism linked to rural areas, agricultural activity, and sustainability. Unlike other forms of rural tourism mainly focused on accommodation or relaxation in natural environments, agritourism incorporates direct participation in agricultural, livestock, gastronomic, or cultural activities related to the territory.

This form of tourism allows visitors to connect with the productive reality of the countryside while also offering new economic opportunities for rural communities. Its importance is not limited to the tourism sector, as it can also contribute to economic diversification, the conservation and restoration of cultural heritage, the promotion of local products, and a more responsible management of natural resources.

In this context, agritourism is presented as a tool for sustainable rural development, especially relevant in territories where agriculture plays an important economic and social role. This is the case of the province of Almería, an area shaped by a model of intensive agriculture with significant technological innovation, which faces challenges such as improving efficiency in the use of water resources due to scarcity and the need to diversify its tourism model beyond coastal tourism.

Agritourism can be defined as a form of sustainable tourism developed in rural areas, where agricultural activity constitutes the central element of the tourist experience. It is not simply about visiting the countryside or staying in a rural house, but about directly learning about production processes, rural ways of life, traditional knowledge, and the cultural heritage associated with agriculture and livestock farming.

One of its main characteristics is the direct relationship between visitors, producers, and the local community. Through visits to farms, workshops, tastings, interpretive routes, or participatory activities, visitors can better understand the origin of food and the social, economic, and environmental value of agricultural landscapes.

Agritourism differs from other forms of rural tourism because it places productive activity at the center of the experience. While rural tourism may be limited to accommodation in a natural or peaceful environment, agritourism involves a closer connection with agricultural production, local culture, and the regional economy.

Agritourism as a Rural Development Strategy

Agritourism can play an important role in diversifying rural economies. Many agricultural farms depend on changing markets, high production costs, and reduced profit margins. Incorporating tourism activities can provide an additional source of income and improve the economic viability of small and medium-sized farms.

Among the most common activities are guided visits to farms or agricultural businesses, participation in farming tasks, gastronomic workshops, direct sale of products, tastings, rural accommodation, and educational experiences related to the environment and food. These initiatives not only generate income for producers but can also benefit restaurants, shops, transport companies, local guides, and other local services.

In addition, agritourism can help maintain population levels in rural areas. By creating new employment and entrepreneurship opportunities, especially for young people and women, it can reduce dependence on traditional economic activities and strengthen the social fabric of villages.

Likewise, agritourism can complement the traditional tourism model of rural areas by offering year-round activities, reducing seasonality, and attracting visitors interested in sustainability, healthy eating, rural culture, and knowledge of the territory.

Local Economic Impact

One of the main benefits of agritourism is its economic impact on rural areas. Agricultural farms that incorporate tourism activities can expand their sources of income and reduce their exclusive dependence on the sale of agricultural products. This diversification is especially important in a context of price volatility, international competition, and rising production costs.

Agritourism also promotes the creation of local value chains. Visitors participating in an agritourism experience may consume local products, eat in local restaurants, stay in rural establishments, and purchase products directly from producers. In this way, tourist spending is distributed more broadly throughout the territory.

Furthermore, this form of tourism can encourage rural entrepreneurship. Small farmers, cooperatives, artisans, tour guides, and family businesses can find in agritourism an opportunity to differentiate themselves and offer experiences with greater added value. In contrast to mass tourism models, agritourism focuses on more personalized, authentic experiences connected to the territory.

However, for the economic impact to be positive, initiatives must be well planned and the local community must participate in their design and management. Otherwise, there is a risk that the benefits will be concentrated among a few actors or that the territory will become merely a tourism product.

Social and Cultural Impact

Agritourism also has a highly relevant social and cultural dimension. Through these experiences, traditional knowledge related to agriculture, gastronomy, crafts, local festivals, and rural ways of life can be preserved and transmitted.

Many rural traditions have historically been passed down orally and through practice. Cultivation techniques, methods of water management, traditional recipes, agricultural tools, and customs linked to the agricultural calendar form part of a cultural heritage that may disappear if it is not valued and transmitted to new generations.

Agritourism allows this knowledge to acquire a new educational and economic function. Visitors do not simply consume an experience; they learn about the territory, its products, and its communities. This interaction highlights local heritage and improves the social appreciation of agricultural work.

It can also create opportunities for inclusion. Rural women, young entrepreneurs, cooperatives, and small producers can participate in the design of tourism experiences linked to their knowledge and skills. In this way, agritourism can become a tool for social revitalization, provided that it is developed from a participatory and respectful perspective.

However, there are also risks if tourism is not properly managed, as it can simplify or transform rural culture into a mere spectacle for visitors. Therefore, it is important to ensure that local communities maintain control over how their identity is represented.

Environmental Impact

The environmental dimension is one of the most important aspects of agritourism. This form of tourism is commonly associated with sustainability, but its impact depends on how it is planned and managed. Not all tourism activities in rural areas are sustainable simply because they take place in the countryside.

Well-designed agritourism can contribute to the conservation of agricultural landscapes, the maintenance of traditional crops, the protection of biodiversity, and the environmental awareness of visitors. It can also encourage practices such as water conservation, waste reduction, the use of renewable energy, sustainable mobility, and the consumption of local products.

In Mediterranean regions such as Almería, water management is especially important. Water scarcity and the effects of climate change require the development of more efficient agricultural and tourism models. In this regard, agritourism experiences can serve to showcase irrigation technologies, resource management systems, and more sustainable agricultural practices.

In addition, agritourism can help educate visitors about the relationship between food, territory, and the environment. Understanding how food is produced, which resources are used, and the impacts generated by consumption can encourage healthier and more responsible food consumption.

Nevertheless, possible negative impacts must also be considered, such as increased traffic, waste generation, pressure on natural spaces, or the trivialization of rural landscapes. Therefore, it is necessary to establish capacity limits, environmental criteria, and monitoring mechanisms. This comparison demonstrates that agritourism has a distinctive value compared to other tourism models. Its main contribution lies in the integration of economic activity, territory, culture, and environmental education.

Alignment with Rural Development Policies

Agritourism is aligned with various rural development and sustainability strategies promoted at European, national, and regional levels. The European Union's Common Agricultural Policy promotes the economic diversification of rural areas, innovation, environmental sustainability, and generational renewal in the agricultural sector, another major challenge.

It is also linked to LEADER programs, aimed at participatory local development in rural areas. These programs support initiatives that strengthen local economies, encourage entrepreneurship, and improve the quality of life in rural territories.

Likewise, agritourism contributes to several Sustainable Development Goals, especially SDG 8 related to decent work and economic growth; SDG 11 on sustainable communities; SDG 12 on responsible production and consumption; and SDG 13 linked to climate action.

From this perspective, agritourism should not be understood solely as a tourism activity, but as a territorial planning tool. Its development can contribute to improving the resilience of rural areas, reinforcing local identity, and promoting more balanced economic models.

Challenges and Limitations of Agritourism

Despite its advantages, agritourism also presents important challenges. One of them is the need for professionalization. It is not enough to simply open an agricultural farm to the public; it is necessary to design safe, educational, attractive experiences adapted to different visitor profiles.

Another challenge is coordination between sectors. Agritourism requires collaboration between farmers, public administrations, tourism companies, cooperatives, local associations, and training institutions. Without this cooperation, initiatives may remain isolated and have limited impact.

It is also important to improve promotion and commercialization. Many agritourism experiences have great value but fail to reach the appropriate audience due to a lack of visibility, sales channels, or communication strategies.

Finally, it is necessary to avoid overcrowding. The attractiveness of agritourism is based precisely on authenticity, direct contact, and local scale. If it becomes excessively commercialized or disconnected from its context, it may lose part of its original meaning.

Ultimately, agritourism should not be understood as merely an alternative form of tourism, but as a strategy capable of connecting production, territory, and sustainability. When properly managed, it can help strengthen rural economies, preserve cultural and environmental heritage, and offer visitors a more conscious way of relating to the countryside.

Trends and Future Scenarios in Agritourism

Innovation in Agritourism

Agritourism in Spain is undergoing a structural transformation driven by innovation, which not only affects the tourism offer but also business models, digitalization, and sustainability.

The process of innovation in agritourism in Spain takes place in a context of consolidation of rural tourism, which in 2025 reached more than 12.87 million overnight stays and nearly 4.8 million travelers (INE, 2026). These figures reflect a mature market that demands differentiation and added value.

One of the main trends is the transition towards an experiential and participatory model, where travelers are no longer just looking for accommodation in rural environments, but want to engage in agricultural activities, positively valuing immersive experiences linked to farming activities: harvests, artisanal product creation, gastronomic routes, or traditional livestock activities, among many others. This evolution responds to changes in consumer behavior, in a context where the growth in traveler volume has slowed (–0.43% in 2025), but the value of the experience and associated spending has increased. This trend reflects a growing demand for authenticity and connection with the territory. In this context, agritourism is positioned as a natural evolution of rural tourism, offering a differentiated value proposition based on direct interaction with the primary sector.

On the other hand, there is an increasing incorporation of digital technologies, and digitalization already plays a key role in innovation. The need to improve competitiveness intensifies in a sector characterized by relatively low average occupancy (21.6% in 2025), which drives the use of digital tools to optimize marketing, pricing management, and online visibility. Specialized booking platforms, targeted digital marketing, and smart management tools help improve operational efficiency and the visibility of small agricultural businesses. Likewise, digitalization enables personalization of the offer, adapting it to customer preferences.

In addition, there is a trend toward repositioning the product toward higher-value segments. In other words, there is a process of hybridization between rural environments and the search for comfort (rural luxury), with a trend toward accommodations that combine authenticity with premium services (spa, wellness, high-end gastronomy), thus expanding the appeal of agritourism to higher-income segments. This phenomenon aligns with the overall increase in tourism spending in Spain, where international spending reached €134.712 billion in 2025 (+6.8%). Agritourism incorporates elements of “rural luxury” and premium experiences to capture part of this growing expenditure.

Sustainability also constitutes a central pillar of innovation. There is significant demand for responsible tourism products, reinforced by global trends and the need to revitalize rural areas. Agritourism aligns with circular economy practices, organic production, and regenerative tourism. Travelers increasingly value the environmental impact of their decisions, which drives initiatives such as agroecological farms, local consumption, and carbon footprint reduction.

Finally, innovation is reflected in the diversification of tourism products, including:

- Active tourism (hiking, horseback routes, wildlife observation)
- Gastronomic tourism linked to local products
- Educational tourism (farm schools, agricultural workshops)

This diversified approach increases the sector’s competitiveness and reduces seasonality.

New Demand Segments

The evolution of agritourism in Spain is closely linked to the emergence of new demand segments, driven by social, technological, and economic changes. This has led to a significant

transformation in the tourist profile in recent years, giving rise to new segments with specific needs.

One of the main segments is domestic travelers, who still represent the majority of the market (more than 3.6 million rural tourists in 2025). However, this segment shows signs of stabilization or slight contraction, prompting the search for new customer profiles.

In this context, and in parallel, the growth of rural tourism in recent years has been largely driven by international demand, whose overnight stays grew by more than 10% in 2024. This indicates a progressive internationalization of agritourism, opening opportunities in higher-spending markets, especially from the United States, Latin America, and some Asian countries, whose daily spending can be significantly higher than that of European tourists. This profile represents an opportunity for premium agritourism linked to exclusive and personalized experiences.

One of the most relevant segments is urban travelers seeking disconnection (“slow tourism”). This group, mainly composed of residents of large cities, seeks to escape urban stress and reconnect with nature. They value silence, authenticity, and simple yet meaningful experiences.

Another growing segment is digital nomads and remote workers. The consolidation of remote work has driven longer stays in rural environments, provided there is adequate digital connectivity. This phenomenon contributes to reducing seasonality and generating recurring income.

Other notable segments include:

- families with an educational focus, interested in learning experiences for children (contact with animals, sustainable agriculture);
- sustainable or eco-conscious tourists, who prioritize responsible destinations and organic products;
- active senior tourism, with greater time availability and growing interest in cultural and gastronomic activities.

In addition, there is a shift in consumer behavior; although the total number of travelers may stabilize, average spending per tourist increases, indicating a transition toward a higher value-added model—i.e., higher-value tourists, in line with the evolution of global tourism in Spain. The increase in average spending per tourist (more than €1,500 per international visitor) reflects a trend toward more exclusive and personalized experiences, where agritourism can position itself as a differentiated alternative. Finally, demand behavior also shows another structural change: although the number of travelers stabilizes, the average stay has increased to 2.69 days in 2025, contributing to greater economic impact per visitor.

Potential Growth Scenarios

The future development of agritourism in Spain can be analyzed through several growth scenarios, shaped by economic, social, and environmental factors, as well as the evolution of global tourism and rural areas.

- *Scenario 1. Moderate growth based on value*

This scenario aligns with the evolution of tourism in Spain, which reached 94 million international tourists in 2024, consolidating its position as a global tourism powerhouse. Part of this demand could be redistributed to rural environments, benefiting agritourism. In fact, rural tourism has reached a level of maturity reflected in stable demand figures (around 12.8 million overnight stays annually).

In this context, agritourism continues to grow moderately but steadily. Growth is based less on volume and more on value: increased average spending, diversification of supply, and improved quality.

This model is characterized by:

- Professionalization of the sector.
- Integration with local value chains (gastronomy, agricultural products).
- Strong commitment to sustainability and authenticity.

○ *Scenario 2. Specialization and segmentation*

The sector's growth will largely depend on its ability to specialize. Given that rural tourism has reached penetration levels close to 45%, future growth depends on market specialization and segmentation.

The slight decline in the number of rural accommodations (–2.56% in 2025) suggests a process of concentration and professionalization, where only projects with differentiated value propositions will survive. Agritourism can position itself as a premium niche within rural tourism.

Key elements of this scenario include:

- Development of highly specialized products (wine tourism, olive oil tourism, agroecology, local gastronomic experiences, ecological tourism).
- Strengthened territorial differentiation.
- Focus on high-value international markets.

○ *Scenario 3. Seasonality reduction, efficiency, and geographic expansion*

One of the main opportunities in the sector is reducing seasonality. Agritourism, not being exclusively dependent on climate or peak seasons, can generate demand throughout the year. Thus, reducing seasonality emerges as a key opportunity, especially through long stays (remote work), educational programs, or off-season international tourism.

In addition, the low average occupancy rate (21.6%) indicates significant room for improving sector efficiency.

There is also potential for geographic diversification, promoting less saturated destinations and contributing to rural development.

○ *Scenario 4. Risks and limitations*

Despite opportunities, the sector faces several significant challenges:

- Price increases (up to 8.85% in 2025), which may limit demand in certain segments.
- Slight reduction in the number of rural tourism travelers (−0.43%), although offset by higher spending, suggesting possible saturation of the domestic market and the need to explore new international markets and improve competitiveness.
- Although there is saturation in some tourist destinations in Spain, which could shift demand toward rural areas, this also poses new management and sustainability challenges. Structural factors such as rural depopulation or lack of infrastructure must be considered.
- Competition with other tourism models (other types of accommodation, international tourism).

Conclusions and Recommendations

Summary of Results

The analysis carried out throughout this market research confirms that agritourism in Spain has evolved from a complementary rural activity into a strategic tourism segment with strong potential for sustainable territorial development. Although official statistics still do not distinguish agritourism from broader rural tourism categories, the available evidence demonstrates that the sector is experiencing sustained growth, increasing diversification, and progressive professionalization.

The study highlights that rural tourism in Spain reached more than 4.7 million travelers and over 12 million overnight stays in recent years, consolidating itself as one of the most dynamic non-hotel tourism segments in the country. Agritourism, as a differentiated branch of rural tourism, benefits from this favorable context while adding a distinctive value proposition based on direct interaction with agricultural production systems, local culture, gastronomy, and environmental education.

One of the main findings is the strong predominance of domestic demand, which represents approximately three quarters of rural tourism consumers. However, the sector is also undergoing gradual internationalization, particularly among visitors from Northern and Central Europe who increasingly seek authentic, sustainable, and experience-oriented tourism products. The profile of the agritourist is characterized by high environmental awareness, interest in local heritage, and demand for participatory experiences rather than passive accommodation.

The research also confirms a significant transformation in tourist motivations. Traditional rural tourism was historically associated with rest and disconnection, but current agritourism demand increasingly values cultural learning, local traditions, gastronomy, sustainability, and direct contact with productive landscapes. Visitors are not only seeking leisure; they are also searching for authenticity, educational experiences, and meaningful engagement with rural communities. This shift represents one of the most important structural opportunities for the future positioning of agritourism in Spain.

From the supply perspective, the sector remains highly fragmented and dominated by small family-run businesses with limited investment capacity. Most agritourism initiatives continue to operate on a microenterprise scale, frequently combining agricultural production with tourism as a complementary source of income. While this small scale contributes to authenticity and personalized experiences, it also limits professionalization, digitalization, and access to larger commercial markets.

Another key result concerns the growing importance of experiential value. Activities such as harvesting, wine and olive oil tourism, artisanal food workshops, farm visits, educational tourism, and participation in agricultural tasks generate the highest levels of tourist satisfaction and loyalty. Visitor satisfaction levels are particularly high in agritourism compared to other tourism modalities, with strong revisit intentions and positive word-of-mouth promotion. This demonstrates that authenticity and direct interaction with producers are among the sector's most valuable competitive advantages.

The economic impact of agritourism is also highly significant for rural territories. Beyond accommodation income, agritourism stimulates local economies through restaurants, local product purchases, artisan markets, transport services, guides, and complementary activities. Tourist expenditure is distributed across local value chains, generating multiplier effects that contribute to territorial resilience and economic diversification. In regions affected by depopulation and declining agricultural profitability, agritourism represents an important mechanism for maintaining economic activity and creating new employment opportunities.

The environmental and social dimensions of agritourism are equally relevant. The sector contributes to the preservation of traditional landscapes, agricultural heritage, biodiversity, and local knowledge systems. Agritourism also reinforces the social value of farming activities by reconnecting urban populations with food production processes and rural realities. In addition, the sector aligns closely with sustainability objectives promoted by the European Union, including the Common Agricultural Policy, LEADER programs, and the Sustainable Development Goals.

However, the study also identifies several structural weaknesses and challenges. One of the most important limitations is the absence of a unified legal and statistical framework specifically recognizing agritourism as a differentiated category. Regulatory fragmentation between autonomous communities creates uneven standards and reduces visibility for the sector. Likewise, limited digitalization, weak commercialization strategies, low levels of professional tourism training, and strong seasonality continue to constrain competitiveness.

Climate change and environmental pressures also represent major risks, especially in Mediterranean regions such as Andalusia and Almería, where water scarcity and resource management are becoming increasingly critical. Sustainable management practices, environmental education, and efficient resource use will therefore become essential conditions for the long-term viability of agritourism.

Overall, the results demonstrate that agritourism in Spain possesses strong development potential due to its ability to integrate tourism, agriculture, sustainability, and territorial identity into a single economic and social model. Nevertheless, its future consolidation will depend on

the sector's capacity to overcome structural fragmentation, improve professionalization, and adapt to evolving market demands.

Strategic Recommendations

Based on the findings of this research, several strategic recommendations can be proposed to strengthen the competitiveness, sustainability, and long-term viability of agritourism in Spain.

First, it is essential to establish a clearer institutional and regulatory framework for agritourism. The absence of a specific national definition limits statistical monitoring, visibility, and targeted public support. Public administrations should work toward the creation of a harmonized legal framework capable of distinguishing authentic agritourism activities from generic rural accommodation. This would improve market transparency, facilitate policy design, and strengthen consumer confidence.

Second, professionalization must become a strategic priority. Many agritourism businesses are managed by agricultural producers with limited tourism training. While their agricultural expertise represents a major asset, there is a need to improve competencies related to hospitality management, visitor experience design, marketing, customer service, sustainability management, and digital communication. Specialized training programs should therefore be promoted through universities, vocational institutions, rural development agencies, and agricultural cooperatives.

Digitalization also requires urgent reinforcement. Agritourism businesses must improve their online presence, booking systems, digital storytelling, and reputation management capabilities. In a tourism market increasingly shaped by online platforms and social media, digital visibility is no longer optional but essential. Public support programs should facilitate access to digital tools, connectivity infrastructure, and technical assistance, particularly in remote rural areas with weaker technological capacity.

Another strategic recommendation concerns the diversification and experiential enrichment of the tourism offer. Agritourism should avoid competing exclusively through accommodation and instead focus on differentiated experiences connected to local identity. Activities linked to agricultural calendars, gastronomy, artisan production, biodiversity, educational tourism, and wellness tourism can significantly increase added value and reduce seasonality. Product specialization—such as wine tourism, olive oil tourism, organic farming experiences, or agro-ecological tourism—offers important opportunities for market differentiation.

Reducing seasonality should also become a central objective. Agritourism has structural advantages because agricultural activities occur throughout the year. Seasonal events such as harvests, olive picking, traditional festivals, and gastronomic experiences can attract visitors beyond peak summer periods. In addition, remote work trends and the growth of digital nomadism create opportunities for longer stays in rural environments if adequate connectivity and services are available.

Internationalization strategies should be developed carefully and selectively. While domestic tourism remains fundamental, international demand for sustainable and authentic tourism experiences is growing rapidly. Spain possesses strong competitive advantages due to its

agricultural diversity, gastronomy, landscapes, and cultural heritage. Marketing strategies targeting Northern European, North American, and high-value international markets could generate substantial growth opportunities, especially for premium agritourism experiences.

Sustainability must remain at the core of sector development. Agritourism should not simply use sustainability as a marketing concept but integrate it into operational practices, including water conservation, renewable energy, waste reduction, biodiversity protection, sustainable mobility, and local supply chains. Environmental certification systems and sustainability indicators could help improve credibility and market positioning.

Collaboration and territorial governance are equally important. Agritourism development cannot depend solely on individual entrepreneurs. Stronger cooperation is needed between farmers, tourism businesses, public administrations, universities, local associations, cooperatives, and destination management organizations. Integrated territorial strategies can help create tourism ecosystems where accommodation, gastronomy, heritage, agriculture, and cultural activities reinforce one another.

Finally, preserving authenticity must remain a fundamental principle. The success of agritourism depends largely on its capacity to offer genuine and meaningful experiences rooted in local culture and agricultural identity. Excessive commercialization or standardization could undermine the very values that make agritourism attractive. Therefore, future development strategies should prioritize quality over massification and ensure that local communities maintain control over how their territories and traditions are represented.

Design of Agritourism Support Programs

To ensure the sustainable development of agritourism in Spain, comprehensive support programs should be designed to address the sector's structural limitations while maximizing its economic, social, and environmental potential.

The first component of these programs should focus on training and capacity building. Public institutions, universities, and rural development organizations should offer specialized programs combining tourism management, agricultural diversification, sustainability, digital marketing, and entrepreneurship. These programs should target not only existing operators but also young farmers, women entrepreneurs, and new entrants interested in developing agritourism projects.

Financial support mechanisms are also necessary. Many agritourism businesses lack access to investment capital due to their small scale and limited profitability during initial development stages. Public funding schemes, low-interest loans, tax incentives, and grants linked to rural development and sustainability objectives could facilitate infrastructure improvements, digital transformation, renewable energy implementation, and product diversification. Existing European instruments such as LEADER funds and Common Agricultural Policy programs should be more explicitly connected to agritourism development strategies.

Another important element is the creation of integrated destination networks and collaborative platforms. Agritourism businesses often operate in isolation, limiting their visibility and competitiveness. Support programs should encourage the development of local clusters and thematic routes integrating accommodation providers, agricultural producers, restaurants,

cultural institutions, and nature-based activities. Wine routes, olive oil tourism circuits, gastronomic itineraries, and agri-ecological experiences can strengthen territorial branding and increase average visitor expenditure.

Marketing and promotion support should also be prioritized. National and regional tourism agencies could develop specific agritourism branding campaigns emphasizing authenticity, sustainability, local culture, and experiential tourism. Greater participation in international tourism fairs, digital marketing initiatives, and destination branding strategies would improve market positioning and attract higher-value visitors.

Digital transition programs are equally necessary. Technical assistance should help rural businesses improve websites, reservation systems, customer relationship management, social media communication, and online reputation management. In addition, improving digital infrastructure in rural territories is essential to support both tourism services and remote working opportunities.

Environmental sustainability programs should encourage responsible resource management practices. Support measures could include incentives for water-saving technologies, renewable energy systems, sustainable agriculture, biodiversity conservation, and circular economy initiatives. Environmental certification systems adapted specifically to agritourism could reinforce market credibility while promoting best practices.

Monitoring and evaluation systems should also be incorporated into support programs. The absence of specific agritourism statistics currently limits strategic planning and policy assessment. Developing indicators related to visitor profiles, economic impact, environmental performance, and social outcomes would improve decision-making and allow for more effective public interventions.

Finally, agritourism support programs should adopt a territorial and participatory approach. Local communities must be actively involved in the design, implementation, and governance of tourism strategies. Agritourism should not be imposed as an external economic activity but developed as a collaborative process aligned with local identity, agricultural traditions, and community priorities.

In conclusion, the future success of agritourism in Spain will depend not only on market demand but also on the capacity of institutions, businesses, and communities to work together in building a more professional, sustainable, innovative, and territorially integrated tourism model. Agritourism represents a unique opportunity to connect tourism development with rural resilience, environmental sustainability, and cultural preservation, positioning itself as one of the most promising sectors within the future of Spanish tourism.



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MARKET RESEARCH ON AGRITOURISM IN IRLAND



TUS



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Introduction

Ireland is strongly associated with a "green" agricultural image, built on a mild, wet Atlantic climate and a long grass-growing season that suit pasture-based dairy and livestock farming. That image carries real economic weight. Irish food, drink and horticulture exports reached a record €19 billion in 2025, with around 90% of both dairy and beef output sold abroad (Bord Bia, 2026). The same landscape, heritage and green image also underpin a tourism economy worth over €10 billion in 2024 (Fáilte Ireland, 2025a). Agriculture and tourism are two of Ireland's most important indigenous sectors, and they draw on the same raw material. That overlap matters most beyond the main urban centres, where tourism can turn place, food, farming and culture into local income, but where many rural areas also face weaker labour markets, infrastructure gaps and thinner access to services (OECD, 2026). Agritourism sits at this intersection of farm diversification, rural development and experience-based tourism.

It is this intersection that #AGRI&TOUR sets out to develop. The project is an Erasmus+ Cooperation Partnership in Higher Education (KA220-HED) with partners in Spain, Romania, Italy and Ireland, and this report is Ireland's contribution to Work Package 2, prepared at the Technological University of the Shannon (TUS). WP2 provides the market research foundation for the project's training, curriculum and dissemination work (#AGRI&TOUR, 2025).

The report uses the project's own definition. Agritourism is "that niche market of rural tourism which is developed as an income complement to agrarian production and in which the main motivation for tourists is the practice of activities linked to farming professions and the agrarian lifestyle ... together with the owners of the farm" (#AGRI&TOUR, 2025). Farm engagement is treated here as a spectrum rather than a yes-or-no category. It runs from passive (the visitor is simply in a working farm landscape), through indirect (consuming farm produce or watching farm activity), to active (taking part in farm tasks). The Irish offer sits across the whole of that range.

One limitation shapes the report from the outset. Ireland has no dedicated agritourism policy, lead agency or dataset. The activity is not counted separately in national tourism or agricultural statistics, and much of the relevant material is filed not under agritourism but under rural tourism, food tourism or farm diversification. The report therefore relies on a mix of sources, treating broader tourism and rural development evidence as context rather than direct measurement of agritourism. The absence of a central dataset is itself one of the report's findings and recurs throughout. The primary research and its limitations are set out in the research approach that follows.

The report follows the WP2 template. Section 1 examines demand and Section 2 supply. Section 3 sets out the political, economic, social, technological, environmental and legal environment, with competition and entry barriers. Section 4 considers sustainability and impact, Section 5 trends and future scenarios, and Section 6 draws conclusions and recommendations.

Research Approach

This report draws on desk research and primary research to examine current activity, emerging opportunities, barriers to development and support needs in the sector. The desk research

reviewed relevant Irish literature on tourism, agriculture, rural development, farm diversification and agritourism, including policy documents, sector reports and academic literature.

The primary research had two strands. The first was an online survey aimed mainly at farmers already involved in tourism or visitor experiences on their farms, and those considering it. A key limitation shaped how the survey was run. There is no single national network or database of Irish farmers involved specifically in agritourism or farm-based tourism, so there was no defined population from which to draw a representative sample. The survey was therefore circulated through the most relevant farming and tourism networks available to TUS, with the invitation directed at farmers already involved in, or considering, farm-based tourism. The survey itself carried response options for farmers at different stages, including those who had thought about it with no firm plans and those not currently considering it. Respondents were given a broad, plain-language description of agritourism as visitor experiences on, or directly connected to, a farm, which matches the spectrum of farm engagement used throughout this report.

A total of 70 farmers completed the survey. Of these, 24 were currently operating farm-based visitor experiences, 9 were starting shortly, 16 were seriously considering it, 10 had thought about it with no firm plans, and 11 were not considering it. The findings offer an exploratory insight into the experiences, intentions, barriers and support needs of farmers already engaged with, considering, or otherwise responding to the idea of agritourism.

Respondents spanned a range of ages, locations and farm types. By age, most sat in the middle of the farming age range, with 22 aged 45 to 54, 17 aged 55 to 64 and 14 aged 35 to 44, alongside 8 under 35 and 9 aged 65 or over. The 64 respondents who stated what county they were located in came from 16 counties, with Tipperary (21) and Kerry (10) the most strongly represented. By enterprise type (respondents could select more than one), beef was the most common (31), followed by organic farming (26), tillage (17), sheep (14), dairy and forestry / agroforestry (13 each), horticulture (8) and equine (7).

The survey was an exploratory, small-sample snapshot rather than a representative study. It deliberately targeted farmers with some interest in agritourism, and the profile above reflects that focus, along with a strong showing from Munster and from organic farms relative to the national picture. Its findings are therefore treated throughout as indicative, framed in terms of the farmers and operators who took part and read alongside the secondary evidence rather than relied on in isolation.

The second strand of primary research was a set of semi-structured interviews with four selected stakeholders, chosen to bring together the operator, support and advisory perspectives:

Mags Boland Murphy, rural enterprise consultant with Bofin Consultancy and a mentor and trainer working with the Local Enterprise Office network, InterTradelreland and Fáilte Ireland, and a trainer on the AgriNext programme at TUS, bringing the business mentoring and training-support perspective.

Barry Caslin, Energy and Rural Development Specialist with Teagasc and author of its farm diversification guide *Branching Out* (Caslin, 2024), bringing the advisory and diversification perspective, including planning, supports and the practical economics of on-farm enterprises.

Margaret Edgill, organic farmer, artisan food producer and agritourism operator in Co. Offaly, holder of a UCD Smurfit MBA in tourism and a 2023 Nuffield Scholar whose 2024 report examined agriculture and tourism synergy, bringing both the operator perspective and the findings of her research.

Jarlath O'Dwyer, tourism consultant who also manages the Burren Ecotourism Network, which has a focus on regenerative and sustainable tourism and on operator collaboration, bringing the destination-network and sustainability perspective.

These accounts supplement the desk research and survey findings and are drawn on throughout the report. Interviewees are referred to by surname.

A note on terminology for readers outside Ireland. Several national bodies recur throughout this report:

- **Fáilte Ireland** is the National Tourism Development Authority, which develops tourism within Ireland and runs operator standards, registration and supports.
- **Tourism Ireland** is the separate body that markets the island of Ireland to overseas visitors.
- **Teagasc** is the State authority for agriculture and food research, advice and training.
- **Local Enterprise Offices (LEOs)** are the first-stop local support for small business and microenterprise.
- **Local Development Companies (LDCs)** deliver rural development programmes on the ground at county and local level, including LEADER.

Government departments appear by their standard abbreviations. DAFM is the Department of Agriculture, Food and the Marine, DETE the Department of Enterprise, Tourism and Employment, DRCD the Department of Rural and Community Development, and D/TCAGSM the Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media.

Demand Analysis

Irish agritourism demand sits within a tourism market that recorded 6.9 million overseas tourists in 2024, alongside 1.2 million tourists from Northern Ireland (Fáilte Ireland, 2025a). The main overseas markets were Britain (2.7 million), Mainland Europe (2.4 million) and North America (1.5 million). 2024 also saw 16.6 million domestic trips being made. The Fáilte Ireland regional brands¹ most relevant to farm-based tourism (Wild Atlantic Way, Ireland's Ancient East and Ireland's Hidden Heartlands) together accounted for 4.5 million overseas tourists and 13.8 million domestic trips, substantially more domestic activity than the Dublin region's 2.8 million. Out-of-state expenditure of €6.6 billion combined with €3.6 billion in domestic tourism, over €10 billion in 2024 (Fáilte Ireland, 2025a). Demand is heavily concentrated in the summer months, with July and August being the peak period.

¹ Fáilte Ireland's regional tourism branding is organised around four main experience brands: the Wild Atlantic Way, Dublin, Ireland's Ancient East and Ireland's Hidden Heartlands. These brands cover every county in the Republic of Ireland and provide a framework for regional destination development and promotion (Fáilte Ireland, 2025a).

The segment is not broken out from overseas, domestic or regional-brand tourism reporting, and no satisfaction or loyalty instrument exists for farm-based visitor experiences. The general tourism statistics therefore set the wider context; operator-reported data and stakeholder accounts complement this with an indicative picture at farm level of who the visitors are and what they value.



Figure 1: Fáilte Ireland regional experience brands across the island of Ireland

Sociodemographic profile of the tourist

Ireland's overseas visitor base in 2024 was demographically broad — 15% were under 25, 25% aged 25–34, 15% aged 35–44 and 45% aged 45 or over — and travelled mostly independently, led by couples, then solo travellers, adult groups and families, with 60% first-time visitors and 37% repeat (Fáilte Ireland, 2025a). No comparable demographic profile is published for the domestic market, even though it is the larger of the two by trip volume.

Against this national backdrop, the survey pointed to a different emphasis at farm level. Of the 24 operators in our farmer survey, international families were the single most common visitor category (16, 67%), followed by Irish families (10, 42%), international adults or couples (9, 38%) and Irish adults or couples (8, 33%); school and education groups (4), local community groups (4), corporate or group visitors (3) and eco, nature or wellness tourists (2) appeared more occasionally. One operator also wrote in American family groups and couples specifically.

Beyond families, O'Dwyer, who handles international tour groups, described in interview a distinct high-value niche already operating. These are chauffeur-driven visitors who "want to be driven and taken care of", value exclusivity over large group tours and "don't mind paying for it", sustaining half- and full-day private farm and food experiences. Looking further ahead, Caslin pointed in interview to additional segments with growth potential. These include adventure

tourists, cultural tourists drawn by farm heritage, food enthusiasts engaging with farmers' markets and farm shops, and eco-conscious travellers attracted to on-farm sustainability practices. This points to future rather than current demand and is taken up in Section 5.

Motivations and expectations

In 2024, almost 3 million overseas tourists travelled to Ireland for holidays, leisure or recreation, 2.3 million visited friends or relatives, and just over 1 million travelled for business (Fáilte Ireland, 2025a); the holiday and visiting-friends-and-relatives (VFR) segments (close to 80% of overseas arrivals) are the segments most relevant to leisure-based agritourism. Tourism Ireland's November 2025 Overseas Sentiment Research, surveying 8,065 outbound holidaymakers across eight source markets, finds that "exploring new places, landscapes and cultural activities" is the primary holiday need (79%) and "disconnecting, unwinding and enjoying special moments together" the second (67%); scenery is the most-cited reason for wanting to visit Ireland (31%), particularly motivating among Mainland European markets (Tourism Ireland, 2025).

When asked to choose up to three things visitors seem to value most in their farm-based experiences, current operators ranked "nature, landscape, peace or escape from busy places" first by a substantial margin (17, 71%), followed by "an authentic farm experience" (11, 46%), "a family-friendly activity" (7, 29%), "learning about farming, food or rural life" (7, 29%) and "heritage, tradition or local culture" (6, 25%); "a distinctive place to stay" (4), hands-on or participatory activities (3), local food or farm-to-fork experiences (3) and events or workshops (2) trailed behind. The convergence between "exploration / disconnection" at national level and "nature, landscape, peace" at farm level is one of the stronger demand-side signals in this report.

Food is a significant draw at national level: Tourism Ireland (2025) reports that 71% of overseas holidaymakers consider food at least somewhat important in destination choice and 30% say it plays a big role or is central, with seafood, farm-to-fork and food festivals forming a strong secondary tier of food experiences sought in Ireland. In the operators' feedback, food's low placing in the ranking mentioned above most likely reflects the particular offerings of this small sample rather than any reliable signal about visitor demand for farm food.

Two further signals emerged in interview. Caslin describes urban visitors wanting "to get out and get a break from city life" and suggests silence itself is becoming a tourism commodity; Edgill anticipates "more and more people looking for downtime... wanting to connect with nature... de-stressing." Caslin further notes that farmer enquiries about developing agritourism have increased steadily since COVID-19, which he links to the post-pandemic staycation surge and growing interest in authentic rural experiences. The more recent domestic-demand picture is more mixed and is taken up in Section 3.

Consumption and spending behaviour

Overseas tourists visiting Ireland spent an average of €121 per person per day in 2024, rising to €168 among overseas holidaymakers, while domestic overnight trips averaged €98 per person per day (Fáilte Ireland, 2025a), with spend concentrated in accommodation, food and drink, internal transport, shopping and entertainment.

Tourism Ireland (2025) reports that for countryside breaks, hotels lead accommodation consideration (64%) but B&Bs and guesthouses (46%) and whole-house rentals (27%) play a significant role, with nearly two-thirds of holidaymakers willing to switch accommodation type or timing rather than abandon Ireland as the destination if their preferred type is unavailable.

Within that overall visitor spend, surveyed operators appear to earn mainly from the core booking (the stay or the main activity/attraction) and less consistently from the extra spending visitors might do while on the farm. Edgill (2024) suggests that secondary spend is often the more profitable part of the offer. Of the 24 current operators, 13 (54%) reported that secondary visitor spending was "not applicable" to their current offer; only 4 cited crafts or souvenirs, 2 cited add-on activities and one each cited food, longer stays or upgraded packages. Most of the sample of operators were running a single-transaction model rather than the layered model documented in international comparators by Edgill (2024) e.g. farm-shop, café, workshop, retail.

The spending figures above look healthy, but they sit against a more cautious economic backdrop. Fáilte Ireland (2025b) reported a subdued outlook across both domestic and overseas markets during 2025, with 81% of inbound tour operators citing the cost of tourist accommodation as a concern and 51% of attractions operators citing reduced visitor disposable income as their top concern; Tourism Ireland (2025) corroborates, with only 50% of overseas holidaymakers agreeing that Ireland offers good value for money (rising to 65% among previous visitors). Edgill notes in interview a conversation with an established glamping operator whose business had seen a strong opening year followed by a significant fall in occupancy in year two — a cautionary signal that aspirational demand and sustained occupancy are not the same thing.

Satisfaction and loyalty level

No centralised satisfaction or loyalty dataset exists for Irish agritourism; there is no equivalent of the customer-satisfaction tracking carried out for hotels or for visitor attractions. The closest available proxies are the wider sector signals captured by the Fáilte Ireland (2025b) Tourism Barometer and Tourism Ireland (2025) Sentiment Research, together with feedback from the farmer survey.

Sector-wide evidence demonstrates a significant loyalty pattern. The September 2025 Tourism Barometer reports that 55% of operators across the wider tourism sector cite "positive reviews and recommendations" as a reason to be positive about the year and 42% cite "repeat visitors", with these positives ranking highly in every sector (Fáilte Ireland, 2025b). On the demand side, Tourism Ireland (2025) finds that recommendations from family and friends are the single most cited inspiration source for choosing a destination (43%) and the fourth most cited research source when planning (30%). Word-of-mouth and reviews therefore work in both directions. They are how a satisfied visitor signals a good experience, and they are also how the next visitor decides where to go, so a good experience should help generate future demand.

The operator picture is also clearly positive. Of the 24 current operators surveyed, 20 (83%) reported positive online reviews or public feedback, 16 (67%) reported word-of-mouth referrals, 15 (63%) reported repeat visitors, 8 (33%) reported return bookings from schools, groups or organisations. The convergence across the three leading channels — public reviews, repeat custom and word-of-mouth — is consistent.

Two things temper this picture. The signal is operator-reported, so operators describing their own business may tend to present it favourably. There is also a survivorship effect. An operator running a poor visitor experience tends to exit the market quickly, so a survey of 24 current operators is, almost by definition, a survey of operators whose experience is being received reasonably well.

The overall reading for demand is one of cautious optimism. Overseas-visitor motivations (exploration, disconnection, scenery) align well with what farm-based experiences can offer, and current operators report consistent satisfaction signals through the same channels the wider sector also relies on.

Supply Analysis

Irish agritourism supply sits at the intersection of a small-farm, livestock-dominated agricultural base and a tourism economy that is heavily concentrated in summer months and along recognised visitor corridors. The 2023 Farm Structure Survey recorded 133,174 farms with a mean farm size of 34.7 hectares, a mean holder age of 59.4 years, and 56% of farms classified as Specialist Beef (CSO, 2024); the 2020 Census of Agriculture had earlier noted that on 33% of farms the holder was aged 65 or older while only 7% were aged under 35 (CSO, 2022). The structural canvas is therefore an ageing, small-scale, livestock-dominated farm sector in which any tourism activity is almost always secondary to the primary farm enterprise. Drawing on Teagasc National Farm Survey data, Edgill (2024) finds that 37% of cattle farms are classified as economically vulnerable and that a substantial further share of farms are classified as sustainable only because of off-farm income.

Accommodation supply is captured under separate Fáilte Ireland approval categories for hotels, guesthouses, B&Bs, self-catering, and caravan and camping. Experience-based offerings such as open farms, on-farm food and craft and sheepdog demonstrations sit largely outside formal classification. Even the farm tourism that is counted is counted narrowly. The CSO Farm Structure Survey recorded about 1,200 farms offering farm tourism (bed and breakfast and farm holidays) as a supplementary activity in 2016, under 1% of holdings, and no breakdown has been published since. Edgill (2024) and the Oireachtas Joint Committee on Tourism, Culture, Arts, Sport and Media have both flagged this lack of a coherent data picture as an impediment to sectoral planning, with the Committee's Developing Rural Tourism in Ireland report (Houses of the Oireachtas, 2023) calling for stronger cross-departmental coordination.

The same gap has been noted at European level: a recent Erasmus+ vocational-training project across six member states described an "absence of statistical consistency and comparable data" as a defining sectoral problem (STAY Project, 2024). The picture below is therefore assembled from multiple agency, industry and operator sources rather than from a single authoritative dataset.

Typology of farms and services

For the purposes of this report, the Irish offer is grouped into four areas informed by Fáilte Ireland accommodation categories, Teagasc diversification guidance and the agritourism ecosystem framing in Edgill (2024).

Farm-based accommodation. Farmhouse B&B operates under Fáilte Ireland approval requirements and the Welcome Standard (Teagasc, 2024a). Self-catering on working or formerly-working holdings — restored farm cottages, converted outbuildings, purpose-built lodges — has grown alongside the wider self-catering sector examined by Power (2024) for the Irish Self-Catering Federation. Engagement of visitors availing of farm-based accommodation ranges from passive proximity to active participation, and the Fáilte Ireland accommodation categories do not distinguish at this level of detail. The recorded supply therefore inevitably mixes providers who sit nearer the agritourism end of the spectrum with providers who, on a strict reading of the project's definition, are operating closer to rural tourism.

Glamping and on-farm camping - Pods, shepherds' huts, yurts and safari tents have emerged as a distinct cluster over the past decade, often on smaller livestock or mixed holdings. Teagasc rural-development guidance positions glamping as one of the more accessible diversification routes for landholders (Teagasc, 2024b). As with farm-based accommodation, engagement varies: a glamping operator may offer guests genuine immersion in farm life, or the working farm may function as little more than a scenic setting.

Visitor experiences and attractions - Open farms, on-farm cookery and food experiences, sheepdog demonstrations and other animal-based experiences, craft experiences, farm walks, equestrian enterprises, and heritage-led offerings combining farm activity with archaeological, conservation or cultural interest. These are predominantly day-visit products rather than overnight stays.

Producer-led food and drink tourism - Farm shops, artisan producer visits, dairy demonstrations and on-farm distillery or brewery experiences. Fáilte Ireland data cited by Teagasc records a significant rise in online search activity for rural and food-related experiences post-pandemic, with farm shops in particular benefiting from a shift in consumer preference toward local and authentic food (Teagasc, 2025b).

A defining feature across all of these areas, consistent with the wider European integrated rural tourism literature, is that providers are largely small, family-operated and embedded in pluriactive farm households (Cawley and Gillmor, 2008; STAY Project, 2024). Agritourism in Ireland is, in almost all cases, an additional income strand rather than a substitute farm enterprise (Edgill, 2024).

The farmer survey is broadly consistent with this four-area typology. Of 70 respondents, 24 currently offer farm-based visitor experiences. Tourist accommodation is the most common activity in this group (15 of 24, 63%), followed by nature, walking and landscape-based experiences (12, 50%), farm tours (10, 42%), educational visits (7, 29%) and events or workshops (6, 25%). Animal-related experiences, food/farm-to-fork offerings and craft/heritage/cultural experiences each appear in smaller subsets (4–5 operators), while only one operator reports a

farm shop or direct-sales. On average each operator offers 2.7 different activities, though as set out in Section 1.3 the revenue model remains largely single transaction.

Capacity, prices and seasonality

Most operators are small. Farmhouse B&Bs typically have three to six rooms (Teagasc, 2024a); glamping and self-catering offerings tend to be small clusters of units rather than scaled developments. Open farms can take more visitors per day, but are relatively small compared to mainstream visitor attractions.

Pricing reflects this scale, the seasonal demand pattern and the additional service costs of operating from a working farm. Indicative glamping rates are in the €100–200 per night range, depending on location and specification (Teagasc, 2024b). Experience-based products — guided farm tours, sheepdog demonstrations, cookery classes — are priced per experience and often run as standalone day-visit businesses. The farmer survey is consistent with this picture of small, supplementary activity: of 24 current operators, 15 describe the visitor activity as a small business alongside farming or as a seasonal/occasional sideline, 8 describe it as a significant part of the overall farm or family business, and only one treats agritourism as the main enterprise.

For agritourism operators, summer concentration is the dominant pattern. 13 of the 24 current operators in the farmer survey reported demand as mainly summer, but it is not the universal one: 8 (33%) reported demand fairly evenly spread across the year, and a small number reported extended seasons running from spring into autumn. Operators whose offer targets schools, groups or domestic visitors are less likely to be tied to the standard summer-tourist pattern.

For the summer-concentrated subset, the farm calendar compounds the constraint. Summer is a busy working period on most Irish farms, particularly on the beef and sheep holdings that dominate the small-farm base, which limits operators' ability to host guests at peak demand. Spring carries its own workload, including calving and lambing, which may block extension into shoulder-season markets such as school visits or spring breaks. The combination produces a short, intense trading season and under-utilisation of capacity outside the peak summer months.

Operators outside the main tourist corridors face the constraint more sharply. Drawing on her own experience as an operator in Co. Offaly, Edgill notes in interview that an inland location cannot generate the bed-nights five days a week, six months a year, that would justify the substantial capital outlay required for new agritourism accommodation on bed-night revenue alone, a point she suggests pushes operators in such locations toward complementary revenue strands.

Within the wider sector, operator responses to seasonality include shoulder-season experience products, targeting of school and educational markets in spring and autumn, and packaging within the Fáilte Ireland regional brands (Wild Atlantic Way, Ireland's Ancient East and Ireland's Hidden Heartlands) which provide year-round destination visibility.

Marketing channels

Marketing channels in Irish tourism have shifted substantially over the past decade. Distribution was historically mediated through dedicated farm-stay representative bodies, printed directories and significant reliance on repeat custom and word-of-mouth. The latter remain central: the September 2025 Tourism Barometer reports that across the wider tourism sector 55% of operators cite "positive reviews and recommendations" and 42% cite "repeat visitors" as leading reasons to be positive about the year's business, with own marketing third at 35% (Fáilte Ireland, 2025b). Online travel agents (OTAs), primarily Booking.com and Airbnb, have since become important intermediaries, lowering search costs for visitors while introducing commission structures, ratings dynamics and platform dependencies that small providers such as agritourism operators were not historically exposed to.

Other important marketing channels include direct booking through an operator's own website which retains the highest margin per booking and the strongest brand-building potential. Social media including Instagram and TikTok for visual discovery, Facebook for community and repeat engagement has become a low-cost route into discretionary leisure segments that conventional travel marketing reaches less efficiently, and Fáilte Ireland has identified the growth in online search for rural experiences as a tailwind (Teagasc, 2025b). The regional Fáilte Ireland experience brands and destination level marketing provide an umbrella visibility no individual small operator could generate alone. Specialist glamping directories supplement these channels for sub-segments not well served by general OTAs.

The farmer survey reflects this channel mix. Of 24 current operators, 13 use online booking platforms, 11 word of mouth, 10 social media and 7 their own website (multi-select). Only two mention tour operators, school/group contacts or Fáilte Ireland and other tourism body listings, suggesting that for most operators, direct and platform-mediated routes outweigh intermediary or destination-organisation channels.

Professionalisation and digitalisation

Professionalisation is shaped by the pluriactive context in which most providers operate: operators are most often farmers first and hospitality businesses second. Quality assurance sits with Fáilte Ireland, which operates approval and registration frameworks for hotels, guesthouses, B&Bs, self-catering and caravan/camping under the Tourist Traffic Acts, alongside the Welcome Standard for visitor-facing businesses outside the formal accommodation categories (Edgill, 2024). Uptake at the smaller end of the sector is uneven; Power (2024) notes that the operating environment for small self-catering operators has tightened materially since 2022.

Several providers including Teagasc, Fáilte Ireland, the Education and Training Boards, Higher Education Institutes, Skillnet networks, Local Enterprise Offices and, at intervals, LEADER-funded initiatives deliver training relevant to agritourism through programmes on business skills, tourism related training, farm diversification and rural enterprise development. Many of these opportunities are very relevant but none offers a targeted agritourism professional pathway.

At EU level, Erasmus+ projects have addressed adjacent gaps. AgriNext, a multi-country Erasmus+ project on multifunctional agriculture spanning agritourism, on-farm energy, food and

related diversification, included TUS as the Irish partner and delivered a training programme to existing farmers in Ireland (AgriNext, 2024). STAY (Still Tourism Around Yard) has focused specifically on vocational education and training for agritourism establishments across multiple EU countries (STAY Project, 2024). Both projects have produced materials accessible to Irish operators.

In interviews for this report, Caslin, Boland Murphy and Edgill all acknowledged AgriNext's multi-strand approach, classroom training, mentoring, peer-to-peer learning and exposure to successful operators as a useful template for future provision.

The fragmentation noted above reflects a broader policy gap. Edgill (2024) calls for the development of a National Agritourism Strategy, arguing that Ireland's established "green" reputation is not matched by the cross-departmental policy infrastructure seen in comparable countries — a strategy that would, among other things, strive to provide the coherent professionalisation framework the sector currently lacks. This view was echoed independently in interview with Caslin who identified the absence of a strategy as a primary impediment to development of the sector.

Digitalisation, understood as the current state of operators' digital infrastructure, runs along a wide spectrum. At one end, providers use integrated booking engines, channel managers, online payment systems and structured social-media marketing; at the other, providers continue to rely on email and telephone enquiry, manual diary management and basic websites with limited transactional functionality. The forthcoming Short-Term Letting Register will require all in-scope operators to interact with a digital registration system, which is likely to surface (and in some cases force a reduction in) this digital divide. Fáilte Ireland's regional tourism branding is organised around four main experience brands: the Wild Atlantic Way, Dublin, Ireland's Ancient East and Ireland's Hidden Heartlands. These brands cover every county in the Republic of Ireland and provide a framework for regional destination development and promotion. Forward-looking questions about emerging technologies and platform innovation are looked at in Section 5.

Of 23 current operators answering, less than half (44%) report having their own website and only 17% use email marketing. This is consistent with the earlier finding that most rely on booking platforms for discovery and reservations rather than owned digital channels.

Environment and Market Analysis

Irish agritourism operates without a dedicated policy, lead agency or dataset of its own, so its environment is set by the wider frameworks for tourism, planning, insurance and rural development. (The absence of sector-specific data, established in Sections 1 and 2, is not revisited here.) This section applies a PESTEL lens, then turns to competition and to the barriers and opportunities facing operators.

PESTEL analysis

Political. Political and policy decisions influence both supply and demand. They shape the support, funding, coordination and strategic direction available to operators, and they also determine how Ireland is branded and promoted internationally, which shapes the visitor flows

operators draw on. That demand lever is general rather than agritourism specific with Tourism Ireland promoting the entire Island overseas. The demand picture is set out in Section 1, so the political factors particular to agritourism are supply-side.

Responsibility for agritourism is spread thinly, with no single body holding a clear mandate: it touches the Department of Agriculture, Food and the Marine, the Department of Enterprise, Tourism and Employment, the Department of Rural and Community Development and the Gaeltacht, Fáilte Ireland, Teagasc, the Local Enterprise Offices and Local Development Companies.

High-level strategy is supportive but general — Our Rural Future 2021–2025 (Government of Ireland, 2021), Food Vision 2030 (DAFM, 2022) and the Tourism Development Policy Framework 2025–2030 (D/TCAGSM, 2024) all touch on rural or farm tourism without being framed around it. The successor rural policy, Our Rural Future 2026–2031, is in preparation at the Department of Rural and Community Development and the Gaeltacht and is being informed by the OECD's first Rural Policy Review of Ireland (OECD, 2026), with publication expected later in 2026. A parliamentary committee that examined rural tourism called for stronger cross-departmental coordination (Houses of the Oireachtas, 2023), and the case for the coordinated national strategy set out in Section 2.4 and developed in Section 6 is largely a response to that fragmentation.

Agritourism is funded through broader rural-development, farming and enterprise schemes, with LEADER the principal route. Administered through the Local Development Companies, LEADER is the main source of capital grants for farm diversification and has supported much of the development of farm-based tourism in Ireland. That central role sits against a shrinking budget, however. Core LEADER funding in Ireland has fallen across successive programmes, from €425 million for 2007 to 2013, to €250 million for 2016 to 2020, to €180 million for 2023 to 2027 (ILDN, 2021; DRCD, 2022), a decline the network representing the programme's delivery companies has repeatedly flagged.

The Department of Agriculture's Rural Innovation and Development Fund runs an annual Agri-Food Tourism call that part-funds farm food and tourism projects (DAFM, 2026). Local Enterprise Offices provide training and mentoring and Trading Online Vouchers; their capital grants are largely unavailable to tourism businesses because of displacement rules, though salary supports can apply to unique offerings that target overseas visitors. Enterprise Ireland innovation vouchers are open to SMEs working with knowledge providers. For eligible operators in the former-peat Midlands, the regionally bounded EU Just Transition Fund is delivering a tourism strand through Fáilte Ireland to 2026.

Economic. From a supply perspective, thin margins from farming are the underlying push toward diversification. For many farm households the stronger competing pull is off-farm employment. In 2024 the average family farm income was €35,937, with 43% of farm operators and 61% of farm households drawing some form of off-farm income (Teagasc, 2025a); for many, the off-farm wage is what keeps the farm viable at all. Against a steady non-farm salary, agritourism's hours-for-euros return, particularly in the start-up years, can be a hard sell. Among the survey respondents not considering agritourism, satisfaction with current farm or off-farm income was one of the most cited reasons, and Caslin linked the broader challenge of keeping the next generation on the land to the availability of good jobs in Ireland and abroad. Even with grant

aid, the cost of getting set up represents a meaningful own outlay. Insurance costs are a further ongoing weight, discussed under Legal.

On demand, trading conditions in 2026 are mixed. Foreign visitor numbers to Ireland fell 3% in 2025 to 6.4 million and visitor expenditure dropped 9% to €5.5 billion (CSO, 2026). Q1 2026 has rebounded strongly, with overseas visitor spend up 24% year-on-year (CSO, 2026), though Tourism Ireland has flagged geopolitical headwinds and softer consumer confidence (Tourism Ireland, 2026). Another structural pressure on operators serving the domestic market is that Irish leisure spend is leaking outbound: Irish residents took 2.9 million outbound overnight trips in Q1 2025 alone, up 16% on the prior year, with outbound expenditure of €2.2 billion, while domestic overnight trips fell 8% in the same period (CSO, 2025). Irish visits to Spain by early 2026 stood at 174% of pre-pandemic levels. Cheap short-haul connectivity and a post-pandemic appetite for sun compete directly with the domestic-break market many agritourism operators depend on.

Social. Social and cultural factors shape both who chooses to operate in the sector and who chooses to visit. On the supply side, cultural reticence is the most persistent factor. Boland Murphy described a "fear of the unknown" and a reluctance among some farmers to disclose income or open the farm to strangers and stressed that education and visible success stories matter more than any single grant. Among the eleven survey respondents not considering agritourism, discomfort dealing with visitors and never having considered the idea were each cited four times. This reticence mirrors international findings that farmers are often only lukewarm about opening the farm to visitors, even where the economic logic is sound (Haugen and Vik, 2008). The demographic profile of the sector compounds the inertia: the average age of an Irish farm operator is 59 (Teagasc, 2025a), and succession is often uncertain. For many would-be successors, the off-farm wage discussed under Economic is the more attractive path.

On demand, the underlying lifestyle and cultural currents are largely favourable to agritourism. Visitor interest in authenticity, food provenance, slow tourism, family-friendly outdoor experiences and a desire to connect with rural Ireland's character has been growing, and the visitor profile and motivations these trends produce are detailed in Section 1.

Technological. On supply, digital booking, online travel agents and social media now underpin how most agritourism enterprises run and reach visitors; the detail of operators' tool use and the digital divide is covered in Section 2.4. The same tools that widen the market also widen the gap between operators with integrated digital systems and those whose adoption remains partial.

On demand, the bigger structural shift in the past decade has been visitor findability. O'Dwyer noted in interview that "with GPS now and with Eircodes, it's easy to get people to your farm without depending on passing trade," and that operators have moved decisively to a model in which the visit is booked in advance, paid in advance and navigated by phone. The practical effect is that physical location matters less than it once did: farms off the main routes, down boreens or on poorly signed roads can now be found by any visitor with a smartphone, which has shifted the economics of where an agritourism business can credibly operate.

Environmental. Environment is what agritourism actually sells. The landscape, the working farm and the wider rural ecosystem are not factors acting on the offer — they are the offer.

Conservation areas such as the Burren, the patchwork of farmed countryside, coastline and waterways, walking and cycling routes, and the sights and rhythms of working land all sit at the heart of what operators' host.

The principal operating constraint is Irish weather, and the short trading season it produces. Ireland's maritime climate brings high annual rainfall (typically 800–1,200mm in the lowlands and considerably more in the west and uplands), mild but variable summers, and frequent unsettled spells even in peak months. Outdoor visitor activity is concentrated in June to September when daylight is long and conditions are most reliable, but operators routinely manage around wet days within that window. The farm-calendar dimension of seasonality — silage, hay, harvest, calving and lambing — is set out in Section 2.2.

Wider climate and biodiversity policy such as sectoral emissions targets, the nitrates derogation, the Nature Restoration Regulation is reshaping the farming context in which agritourism sits, and over time will influence which on-farm activities operators can credibly develop. Visitor appetite for nature-based experience, landscape and authentic farm settings is detailed in Section 1.

Legal. Legal pressures act overwhelmingly on supply. They shape what operators can do, where, at what cost and on what risk profile. The demand-side effect is largely indirect. Visitors expect compliance and consumer protection but rarely choose an offer on that basis. Three interlocking supply-side pressures dominate.

The first and most current is the Short-Term Letting Register. Originally due to commence on 20 May 2026, it has been delayed and is now set to open on 1 December 2026, with all in-scope operators legally obliged to register by 31 December 2026 (DETE, 2025; Fáilte Ireland, 2026). It applies to any paid let of 21 nights or less, requires a unique registration number on every listing, must be renewed annually, and obliges hosts to declare compliance with planning, fire safety and building control. Booking platforms such as Airbnb, Booking.com must check that each listing carries a valid registration number before publishing it, and share listing data with authorities, in line with EU Regulation 2024/1028 — the mechanism that gives the register practical teeth.

Critically, a change of use to short-term letting will normally require planning permission, tying the register directly to the planning system. Underlying the new rules is an unresolved tension in how short-term lets are framed. Treated as a housing-supply problem, the regulatory direction is to restrict listings and return units to long-term rental — the logic behind the planning-permission requirement for change of use. Treated as legitimate tourism businesses, the direction is to register and integrate them into the visitor economy. The current framework does both at once, leaving accommodation-based operators uncertain whether the long-run trajectory is to enable them or to squeeze them out (Power, 2024).

The second pressure is the planning system itself. Caslin pointed to local-authority caution about glamping and camping pods "sprouting up". The farmer survey bears this out: 10 of 24 current operators named planning or regulation among their main operating challenges, and it recurs among those farmers preparing to start (3.3).

The third is insurance. Ireland's litigation-driven claims environment keeps public-liability premiums high for small operators even though headline claim volumes have fallen since the 2021 Personal Injuries Guidelines (Central Bank of Ireland, 2025). Caslin noted that few Irish insurers will cover higher-risk activities such as kayaking or boat hire, which can constrain the experience side of the offer.

The pressures compound. Power (2024) found insurance cost and impending planning changes among the reasons that 129 quality-assured self-catering properties delisted from the Irish Self-Catering Federation between 2022 and 2024, with counties Galway, Mayo, Kerry and Cork accounting for almost two-thirds of the loss.

Competitors analysis

Agritourism operators compete in the broader accommodation and visitor-experience market. Competition can be thought of as coming from three broad areas.

First, whole-trip alternatives. The biggest single competitor for the Irish leisure euro is outbound travel — sun holidays in Spain and Portugal, city breaks elsewhere in Europe. The scale of that pressure is set out under Economic; in competitive terms, farm stays in Ireland increasingly have to make the case against a week in the Mediterranean for similar money.

Second, domestic accommodation alternatives. Visitors choosing to stay in Ireland have a wide range of options: town and village-based self-catering and Airbnb, hotels, established B&Bs, holiday parks, and commercial glamping sites that are not on working farms. For some domestic and short-break visitors, accommodation in a town or village, within walking distance of restaurants, pubs and shops, is more attractive than an isolated rural location, particularly for couples and groups looking for evening amenity. Farm-based accommodation typically competes on a different value proposition: setting, authenticity, working-farm context and tranquillity, rather than amenity-proximity. Platforms such as Airbnb and Booking.com put these very different offers on the same search page, which sharpens the choice for the visitor and makes positioning more important for the operator.

Third, experience competitors. On the activity and day-visit side, farms compete with established heritage and visitor attractions, food-tourism providers (cooking schools, distilleries, food trails) and dedicated activity operators (walking, cycling, kayaking).

Entry barriers and opportunities

The survey gives an indicative, small-sample picture, distinguishing between the operating challenges current operators face and the entry barriers reported by those preparing to start. Among current operators, the most cited operating challenges were the operator's own time and labour (13 of 24), marketing and attracting visitors (10) and planning or regulation (10), followed by seasonality and finance (5 each). These are challenges to staying in and growing the business, and they signal what new entrants are likely to face once they are running. For the nine respondents preparing to start agritourism, finance was the most common entry barrier (4), with planning, time and labour, insurance and marketing also recurring, and one citing neighbour objections to a planning application. These numbers reflect a small sample rather

than the sector as a whole, but they are consistent with the interviews. Capital, planning, insurance, skills and time are the recurring themes. They are also consistent with the wider literature, which repeatedly finds that operators fear agritourism will draw time and labour away from core farming and doubt the income justifies it (Schilling et al., 2012). That concern surfaces in the farmer survey too, where the operator's own time is the most cited operating challenge of all and a real factor in whether operators continue in agritourism over the longer term.

Against these sit real opportunities. Accommodation is the most established product line and tends to command the highest per-booking value, though it also carries the highest planning and capital hurdles. Demand for authentic rural and food experiences is strong (Section 1). Rural development and tourism policy is broadly supportive in principle.

Two further opportunities concern how the sector organises itself, and they are not alternatives. The first is a national agritourism brand. Edgill argued in interview that Ireland would benefit from an identifiable designation of the kind found in Italy and Slovenia, on the model of how "everyone knows what Airbnb is." As Section 6 sets out, though, a brand rests on an underlying standard that must come first.

The second works at regional and operator level, through destination networks. Visitors typically choose a region rather than a sectoral category, which gives such networks practical traction, and operators can benefit from belonging to one. The reach and shared marketing are part of it, but the less visible value is peer support, confidence and informal mentoring among operators, which matters most for the small, very often isolated businesses agritourism tends to produce. Ireland has long-established examples. Ballyhoura, on the Limerick–Cork border, has marketed the region and its tourism businesses since 1986 through Ballyhoura Fáilte, Ireland's first community tourism cooperative, building a rural visitor economy from a farming base (Robinson and O'Connor, 2013). In West Cork, the Fuchsia brand has linked more than 160 food, tourism and craft enterprises under a shared regional identity and quality standard since 1998. The more recent Burren Ecotourism Network shows the operator-level effect, with O'Dwyer describing how it builds operator confidence first, then shared marketing so members complement rather than compete, a point Caslin echoed noting that such cooperation keeps operators from competing head-to-head. This peer-learning dimension connects to the mentoring and training theme taken up in Section 6. A national standard would give the sector definition and recognition, while regional networks give operators reach and mutual support. The two work at different levels and are complementary.

Sustainability and Impact

Agritourism's overall footprint in Ireland is small relative to either farming or tourism. Its contribution is best understood not as headline economic weight but as a set of localised effects on farm businesses, communities, landscapes and the policy goals attached to them. The absence of sector-specific measurement means this section relies on operator-reported and stakeholder accounts rather than aggregate impact figures.

Local economic impact

The first-order impact is on the farm household itself. Agritourism widens the income base, smooths some of the volatility of livestock and tillage returns, and lets fixed assets such as sheds, farmhouses, frontage and land earn additional revenue. Asked about the positive impacts agritourism could have for rural Ireland, helping farms remain viable and resilient was by some distance the most common option selected in our farmer survey, cited by 62 of 70 farmers.

Edgill (2024) frames the same point through the lens of the National Farm Survey, where roughly a third of cattle farms are economically vulnerable and almost half of all farms depend on off-farm income for viability.

The farmer survey suggests that agritourism offerings are typically developed at a modest scale: as set out in Section 2, most current operators described their visitor activity as a small business alongside farming or a seasonal sideline, with only one treating it as the main farm enterprise.

The size of that first-order impact also depends on what visitors spend on the farm beyond the core booking. As set out in Section 1, more than half of current operators in our farmer survey reported little or no on-farm secondary spend, reflecting an accommodation-heavy sample (15 of 24 offered tourist accommodation) and the absence in most cases of the shop, café, food product or workshop through which it could be captured.

Beyond the farm gate, the next-order impacts run through local spending. Operators draw visitors who then spend in nearby shops, pubs, restaurants, fuel stations and attractions. They also procure inputs locally, including bedding, cleaning services, food, repair work and marketing support. In our farmer survey, supporting local food, craft and other small businesses (28 of 70) and bringing more visitors and activity into rural communities (32 of 70) were among the most cited expected impacts, with local employment also prominent (29 of 70). Boland Murphy noted in interview that successful agritourism "creates livelihoods" and contributes to "sustainability for local communities" through spending that stays in the local economy.

As there is no national accounting of agritourism's contribution to local economies in Ireland. The impacts described above are operator-reported and stakeholder-attested rather than measured, a gap that Section 6 takes up in its recommendations.

Social and cultural impact

The social and cultural impacts are real but harder to count. The most visible is the contribution to keeping people, particularly younger people, in rural areas. The mechanism is straightforward. Agritourism generates work and income on the farm itself, which can give a son, daughter or partner a reason to stay or return rather than take a job in a nearby town or city.

In our farmer survey, 27 of 70 farmers cited helping to keep young people in rural areas among the main positive impacts they expect agritourism to have. That is more than a third of the sample, for a question in which respondents could choose at most three options. O'Dwyer described in interview how on some Burren farms the agritourism enterprise itself has become the day job. Family members run the visitor business from home rather than commute, which



in turn keeps children in the local primary schools and sustains the village population that local services depend on.

The cultural dimension runs through heritage, working knowledge and storytelling. Agritourism puts a small commercial value on practices that policy already recognises as public goods, including traditional landscape management, vernacular buildings, food provenance and oral history. Caslin pointed in interview to the cultural-tourist segment drawn by farm heritage and rural traditions, from working dogs to mass rocks. O'Dwyer made a stronger point about the reflexive effect on operators themselves. When visitors hear how a family has farmed a piece of ground for generations, the farmers in turn begin to articulate and value practices they had taken for granted.

Preserving local heritage, traditions and ways of life was cited by 16 of 70 farmers as a likely positive impact. This is lower than the economic items but still significant for a question in which farmers chose at most three from six listed options. These remain small-sample, perceptual signals rather than measured social outcomes, and the effects described here are localised. The effects are real where they occur but, given the sector's small scale, do not aggregate to a measurable national impact.

Environmental impact

Environmental impact is mixed and depends on the kind of agritourism being developed. Asked how agritourism could contribute to sustainability, the farmer survey ranked supporting local food and short supply chains first (45 of 70), protecting biodiversity and habitats second (37) and strengthening local landscapes, communities or heritage third (34). Low-impact visitor activities and working with local businesses and community groups followed. Renewable energy uptake and waste reduction registered only marginally, suggesting that environmental sustainability is understood by the sample primarily as land, food and landscape stewardship rather than as carbon or circularity.

The Burren Ecotourism Network is a strong Irish illustration of structured environmental practice in a tourism area. As O'Dwyer described, the network is a group of around 70 tourism businesses in and around the Burren and Cliffs of Moher UNESCO Global Geopark, spanning accommodation, food service, experiences and a number of farm-based operators. Members make an annual code-of-practice submission, evidencing their participation in protecting and promoting the area, including conservation activity such as beach and river clean-ups. That evidence underpins County Clare's destination certification under EarthCheck. O'Dwyer's wider observation was that much of what counts as environmentally "sustainable" on Irish farms is already happening because farming is tightly regulated. What agritourism adds is the ability for operators to package and communicate the practice. In the operators' own framing, that practice is fundamentally about passing the farm on to the next generation in better shape.

A subtler, indirect effect was raised by one survey respondent, who linked agritourism to reducing the financial pressure that drives stocking rates, with implications for nitrate loss and water quality. Whether that effect operates at any meaningful scale is unmeasured. Against these positives, environmental and amenity concerns arise where new on-farm accommodation is poorly sited or specified. Caslin set out in interview the areas local authorities look at when

assessing planning applications for glamping pods and similar developments. These include water supply, electricity capacity for high-demand morning showers, impact on biodiversity (hedgerows, native species, pollinator areas), traffic on narrow country roads, and noise carrying across quiet rural surroundings particularly after dark. These concerns help explain why planning is a principal hurdle very often (Section 3.1, Legal) and why siting and specification matter as much as the activity itself.

Alignment with rural development policies

Agritourism aligns closely, in principle, with Ireland's main rural-development frameworks. *Our Rural Future 2021–2025* (Government of Ireland, 2021) sets out objectives that map directly onto on-farm visitor enterprises, including maximising the potential of all rural areas, supporting entrepreneurship and job creation, and strengthening social, economic and cultural resilience. Food Vision 2030 (DAFM, 2022) frames a sustainable food system in which provenance and farm-level value-adding play a stated role. The Tourism Development Policy Framework 2025–2030 (D/TCAGSM, 2024) is broadly supportive of distinctive, regionally rooted products. The 2023 Joint Committee report on rural tourism made the alignment explicit, treating community-building and rural tourism as mutually reinforcing (Houses of the Oireachtas, 2023).

Funding routes follow the same pattern. LEADER is the principal route in practice, and there is little an agritourism operator might want to do that falls outside its remit, though as Section 3.1 notes its remit is rural development broadly. The Rural Innovation and Development Fund's annual Agri-Food Tourism call (DAFM, 2026), the Just Transition Fund tourism strand in the Midlands and the Local Enterprise Office training and mentoring offer add further routes. The harder asks, taken up in Section 6, are navigability and grant rate rather than the existence of funding itself.

As set out in Section 3, this alignment in principle is not matched by sector-specific measurement, dedicated coordination or a unified evaluation framework. Without those, the impacts described above cannot be tracked at national level, and the case made in Section 6 for a more coherent approach is in large part a case for the means to see what the sector is actually doing.

Trends and Future Scenarios

Forward projections for Irish agritourism are necessarily indicative. There is no time series for the sector, no pipeline data on planning applications by activity type, and no separate visitor research for farm-based experiences. The picture below is drawn from stated intentions in the farmer survey, the wider tourism barometers, and what interviewees described as emerging in their day-to-day work.

Innovation in agritourism

Innovation in Irish agritourism is mostly small-scale and operator-led rather than driven by sector-wide initiatives. Two forms are visible.

The first is in the product. The nine farmer-survey respondents starting shortly mostly planned activities in the same categories the current sector already offers. Six planned nature, walking, landscape or wellness experiences, five planned farm tours, five planned farm accommodation, and four planned animal-based experiences. The planned-activity mix is broadly similar to the current operator sample described in Section 2.1. Where novelty does appear, it is mostly in combination rather than activity. Some operators are moving from the single-transaction pattern that dominates the current sample (Section 1.3) toward a more layered offer of the kind Edgill (2024) documents in international comparators. A glamping cluster runs alongside farm tours and a small food offer. A farm walk is paired with a workshop. Accommodation links with a sheepdog or food experience for day visitors. Edgill noted in interview a growing operator interest in adding experiences rather than expanding accommodation, partly because experience products avoid the capital outlay accommodation requires.

The second is digital. Two shifts are reshaping operators' tools beyond the position described in Section 2.4. The first is the Short-Term Letting Register (Section 3.1), which will force the partially-digital tail of accommodation operators into a digital registration system (or they will leave the sector), with knock-on effects for booking and channel management. The second is the post-COVID maturation of mobile booking, Eircode-based navigation and platform-based search, which has changed where an agritourism business can credibly operate. Visitors can now find a farm anywhere via smartphone and Eircode, as O'Dwyer noted in interview. Operators no longer depend on being on a main road or near an established tourist corridor to be discoverable, and new entrants in less-visited counties can reach customers in ways that were not feasible a decade ago. The wider effect is that small, dispersed providers can find their niche audiences regardless of physical location.

Within this shift, the practical channel question for operators is less settled than it looks. The farmer survey shows OTAs doing the heavier discovery work for current operators, with 12 of 23 using online booking platforms against six using their own website (Section 2.3). For many small accommodation operators, a strong Airbnb or Booking.com listing brings visitor flow that a standalone site would struggle to match. The trade-off is commission against discovery, and whether the next gain lies in adding direct booking alongside OTAs, in better OTA management or in stepping away from OTAs altogether varies by offer type, location and stage.

New demand segments

Demand signals from the wider tourism barometers and from operator and stakeholder accounts converge on the visitor interests likely to shape the sector over the next few years. The long-haul travel outlook for Europe in 2026 is softer than in 2025. Whether this is a one-year correction or a more durable shift cannot be read from a single barometer.

The European Travel Commission's *Long-Haul Travel Barometer 1/2026*, surveying travellers from seven major overseas markets (Australia, Brazil, Canada, China, Japan, South Korea and the United States), reports a more cautious long-haul outlook for 2026. 59% of respondents plan a long-haul trip (down 5 percentage points on 2025) and 42% are considering Europe (down 3), with affordability and a stronger pull toward closer-to-home travel cited as the main drivers (ETC, 2026). Among those who do plan to travel to Europe, however, culture and history,

gastronomy and nature lead planned activities, slow travel rose from 22% in 2025 to 26% in 2026, and wellness is a smaller share but growing (ETC, 2026).

For Irish agritourism the reading splits two ways. The slow-travel, nature and gastronomy signals align well with what farm-based product can offer. But softer overall long-haul demand into Europe is itself a headwind for the North American market in particular, which supplied 1.5 million overseas tourists to Ireland in 2024 (Section 1). The domestic-market side faces its own pressure, with Irish outbound trips and spend growing strongly (Section 3).

The farmer survey is broadly consistent with these signals. Asked which visitor interests would most shape Irish farm-based experiences over the next few years, "nature, wellness and slower forms of tourism" was the most cited (19 of 24), followed by interest in authentic rural and farm experiences (14), digital discovery and online booking visibility (7), local food and farm-to-fork (6), sustainability and environmentally responsible travel (5), learning and educational activities (5) and premium or small-group experiences (4). The ranking is operator anticipation, not measured visitor demand, but it converges closely with what overseas-visitor research already shows.

Two more specific segments are worth noting. The premium small-group market described by O'Dwyer in interview, with chauffeur-driven visitors paying for half-day or full-day private farm experiences and "ultralux" producer visits, was set out in Section 1. O'Dwyer described it as a still-emerging market with further scope. Volumes are small but per-visitor spend is high, and the segment gravitates toward operators with established storytelling and reliable destination management.

Caslin's forward-looking segments flagged in Section 1 (adventure, cultural, food and eco-conscious travellers) sit alongside this. The scale of any of these segments at farm level is unmeasured. Edgill's expectation, set out in Section 1, of growing visitor interest in downtime, connecting with nature and de-stressing aligns with both the Tourism Ireland (2025) sentiment data and the slow-travel trend captured by the ETC. The convergence across these sources is the cleanest forward-looking signal in this report.

Potential growth scenarios

The supply side gives a tentative pipeline picture. Of the 70 farmers in the survey, nine reported they were starting an agritourism enterprise shortly, 16 said they were seriously considering it, and 10 had thought about it without firm plans. Among the nine starters, five expected the activity to be a small business alongside farming, two saw it as a significant part of the farm business, one as occasional and one as too early to say. Their planned marketing channels — social media (8), word of mouth (6), own website (5), local tourism networks (5), online booking platforms (4) — show a stronger weighting toward direct and network channels than the current operator sample (Section 2.3). Across the 26 farmers who were seriously considering or had thought about it without firm plans, farm accommodation (15), nature and landscape experiences (13) and educational visits (11) led planned activity types. The product mix is broadly the same as the existing sector.

The factors holding this pipeline back were captured in the survey. Among the 26 'considering' respondents, four concerns dominated. Fifteen cited whether the activity would generate

enough income to justify the effort or investment. Fifteen cited insurance or liability. Eleven cited planning or regulatory requirements, and ten cited not knowing how to get started. Of these factors, planning and insurance are pressures that current operators also face (Sections 3.1 and 3.3). Income justification and the question of how to start are more specifically entry-stage concerns. Until funding, insurance challenges, planning pathways and the training and mentoring offer all improve, the pipeline will continue to convert only intermittently.

The signals above set up two competing dynamics. Modest conversion from the considering pipeline adds new operators each year. Attrition at the smaller and more isolated end of the sector subtracts them, driven by insurance costs, planning friction, the squeeze on the wider self-catering sector documented by Power (2024), and the natural turnover of an ageing operator base. Which of these forces currently dominates cannot be read from the available data, because there is no baseline enumeration of agritourism operators to measure flow against. The 129 ISCF delistings between 2022 and 2024 are a reminder that net contraction is a real possibility.

A different trajectory becomes possible if the broadly supportive policy is backed by coordinated action. A National Agritourism Strategy of the kind argued for by Edgill and Caslin, support to help operators access the funding that exists, and a multi-strand training pathway could combine to accelerate pipeline conversion and slow attrition. Operator-level networking and clustering, of the kind exemplified by the Burren Ecotourism Network and other networks, is a complementary mechanism for shared marketing, training and visibility. The scale of the gain from a coordinated push is unknown because no baseline exists for the sector.

A persistent finding sits underneath both trajectories. 31 of 70 farmers in the survey rated agritourism's potential to contribute to farm income and rural development as "very high" and 31 felt it had "some potential", with only four rating it as limited or less. Farmer sentiment is broadly positive. Whether the wider environment lets that sentiment translate into business activity is the open question Section 6 turns to.

Conclusions and Recommendations

The sections above set out, against a thin evidence base, an indicative snapshot of Irish agritourism in 2026. This section pulls those threads together, sets out the strategic recommendations the evidence supports, and suggests how a coordinated support offer might be designed.

Summary of results

The demand-side signals for agritourism are favourable in direction. Visitor research (Tourism Ireland, 2025; ETC, 2026) and the operator and stakeholder accounts converge on nature, landscape, slow travel, disconnection and authentic rural experience. That is exactly the territory a farm-based offer occupies. The wider Irish tourism economy at over €10 billion in 2024 remains a large host market (Fáilte Ireland, 2025a).

The supply side is small and pluriactive. Most operators in the farmer survey ran the visitor enterprise alongside farming or as a seasonal sideline, with only one treating it as the main farm

business. Trading is concentrated in the summer for most operators, which is also the busiest stretch of the farming year, so operators face peak farm work and peak visitor demand at the same time. Operators away from the main tourist corridors feel the short season most sharply. As Edgill noted from her own experience in Co. Offaly (Section 2), such locations cannot generate the steady bed-nights that coastal or corridor sites can, so a short season leaves less scope to recover trade across the rest of the year.

The environment is broadly supportive in principle and fragmented in practice. No single department, agency or dataset holds agritourism. High-level strategies — Our Rural Future, Food Vision 2030, the Tourism Development Policy Framework — touch on it without being framed around it. Funding opportunities exist. The difficulty lies in accessing them, with operators often needing support to navigate the application and drawdown process. Planning, insurance and the impending Short-Term Letting Register dominate the legal pressures. Outbound leisure travel by Irish residents is a sustained drag on the domestic-break market many operators depend on.

The sector's impact is real but localised and largely unmeasured. There is no national accounting of agritourism's contribution. Operator and stakeholder accounts point credibly to farm-household resilience, local supplier and visitor spend, rural retention and landscape stewardship, but the calculation that would turn this into a national figure has never been done.

The pipeline is positive in sentiment, uncertain in conversion. 62 of 70 farmers in the survey rated agritourism's potential as 'very high' or 'some', and 25 reported they were starting shortly or seriously considering it. Whether that converts depends on the same constraints — capital, planning, insurance, skills and time — that current operators report as the principal challenges to operating and growing.

A recurring theme across sections is coordination. Many of the ingredients of a functioning sector exist — visitor interest, willing farmers, some public funding, training providers and supportive policy in principle. What is missing is a single body responsible for organising them around agritourism. No one owns the sector, so its supports stay scattered across a number of agencies that engage with it. The recommendations below set out to close the coordination gap and to address the specific weaknesses in measurement, support and skills, with a longer-term step to build agritourism into how the next generation is trained.

Strategic recommendations

Five recommendations follow.

1. *A National Agritourism Strategy with an assigned lead agency.* The case has been made by Edgill (2024) and was endorsed in interview by Caslin. Asked in the survey for a single recommendation to support the sector, several respondents called for a national framework, an identifiable agritourism designation, a new or assigned lead entity, and clear government focus. The strategy should not duplicate existing rural or tourism policy but join it up around the farm-based visitor enterprise specifically, identify the lead department and agency, and set measurable objectives. Its remit should reach from the supports and training operators/farmers need now to the education of the next

generation. At its centre is defining what counts as agritourism in an Irish context, anchored to a working farm. International precedent matters here. Italy regulates agritourism as an agricultural activity in law, tied to the working farm (Edgill, 2024), and recognised farm-holiday brands elsewhere, such as Austria's long-established Urlaub am Bauernhof, rest on exactly that kind of underlying standard. The lesson for Ireland is that the standard comes first, with any brand or label following from it rather than the other way round.

2. *A baseline enumeration and ongoing measurement of the sector.* As Edgill (2024) argues, quantifying the size, scale and economic impact of the sector would itself strengthen confidence in it. A baseline enumeration of operators, a periodic survey, and integration into the National Farm Survey for example would, between them, let the sector's pipeline and attrition be tracked rather than inferred. The absence of this measurement runs through every section of this report and is a finding in its own right.
3. *A dedicated agritourism enterprise support service.* The recommendation is a permanent, agritourism specific advisory function that can guide a farmer from first idea to operating business, helping them scope a project, find the right existing scheme, link up with mentoring such as the LEO network, and see a funding application through to drawdown, while also advising on planning, insurance, registration and tax. In effect it joins the dots between the supports that already exist but that farmers struggle to navigate alone. Boland Murphy, who mentors farmers through exactly this, stressed that whoever delivers it must understand farming, not just tourism or grant systems. A higher grant rate for agritourism projects is a secondary ask.
4. *A permanent agritourism training and professionalisation pathway.* Section 2.4 establishes the gap: provision is fragmented and there is no single, dedicated agritourism pathway. Existing provision such as Teagasc's Options for Farm Families programme, a workshop series that helps farm families weigh diversification options and plan, is a useful foundation but stops short of a sustained professional pathway. The survey points to what that pathway should be built around. Respondents valued advice from existing operators (18 of 70), local networks (18) and clear practical guidance (19) well above short training courses alone (11), which suggests not more standalone courses, but a pathway centred on mentoring, peer learning and exposure to working operators, with formal training as one strand rather than the whole offer.

A useful template is the way TUS delivered the Erasmus+ AgriNext project, a multi-strand approach of classroom training, mentoring, peer learning and exposure to successful operators aimed at existing farmers. AgriNext spans multifunctional agriculture more broadly and ran differently across its partner countries, but that farmer-focused Irish strand is the part worth drawing on here. Delivery should be flexible and hybrid, scheduled so it fits farmers' working lives.

5. *A place for agritourism in agricultural education.* Recommendation 4 addresses people farming now, but the sector's ageing profile and uncertain succession (Sections 3 and 4) calls for a longer-term view. Agritourism should feature in agriculture and related

programmes in further and higher education, so the next generation enters farming already aware of it as a potential option. Modules on farm and rural enterprise or rural tourism may already carry some of this, so the practical first step is to audit what those programmes cover, then address any gaps that remain. These actions should form part of the national agritourism strategy recommended above.

Design of agritourism support programmes

The five recommendations imply an integrated design rather than separate initiatives. The strategy and the measurement beneath it (recommendations 1 and 2) set the national frame, the enterprise support service and training pathway (recommendations 3 and 4) are how that frame reaches the individual operator, and the fifth looks beyond them to the next generation. Two design lessons run through the evidence.

Build capability, not one-off interactions. Asked what would most help, farmers in the survey put start-up funding first (40 of 70), but the qualitative evidence points less to the absence of funding than to the capability to access it, the exception being the gaps between successive LEADER programmes when the scheme is effectively closed to new applicants. Support should build operator capability over time rather than provide isolated interactions.

Put peer learning at the centre. The survey and the AgriNext experience (recommendation 4) point the same way. Operators value mentoring, advice from other operators and practical guidance above standalone courses, so peer learning and exposure to working operators need to be an integral part of any training or capacity building initiatives. The same logic, that operators gain from one another, underpins the value of belonging to an established network. The Burren, Fuchsia and Ballyhoura networks (Section 3.3) give members the mutual support and shared learning no operator gets working alone, and operators elsewhere should be encouraged to join and contribute to the networks in their area where they exist.

A small but persistent minority of survey respondents were sceptical that state bodies could deliver any of this, and that scepticism should be heard. The support should be designed *with* operators, not just for them, drawing on experienced operators to deliver the mentoring and peer-learning elements, with state agencies facilitating rather than directing. Farmer willingness is clear from the survey. Whether the wider support system rises to meet it is the open question this report leaves with its readers.

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MARKET RESEARCH ON AGRITOURISM IN ITALY



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The Italian Agritourism Sector: An Overview

Agritourism has been one of the most consistent success stories of Italian agriculture over the past three decades. From a niche activity practised by a few thousand farms in the early 1990s, it has grown into a structured sector with over 26,000 authorised enterprises, generating nearly two billion euros in annual output and welcoming more than four and a half million guests each year. Understanding it requires looking not only at the numbers — which are impressive — but at the specific regulatory and policy architecture that has shaped the sector's identity and direction.

At its core, Italian agritourism is defined by a legally binding connection to agricultural production. The national framework law — Law No. 96 of 20 February 2006 — establishes that agritourism activities can only be carried out by agricultural entrepreneurs, and that these activities must remain complementary to and subordinate to the farm's primary agricultural function. This principle, known in Italian as the *principalità dell'attività agricola*, is not a formality: it is the conceptual foundation that distinguishes agritourism from generic rural tourism and grounds the sector's identity in the land, the crops, the animals and the seasons of the farm. It is also the source of some of the sector's most interesting policy tensions, as farms seek to expand and diversify their offer while regulators try to ensure the agricultural connection does not become purely nominal.

As documented in the ISMEA 2026 Report, in 2024 Italy counted 26,360 authorised agritourism farms — an increase of 0.9% on 2023 and 7.3% on 2019 — offering more than 310,000 bed places, over 540,000 restaurant seats and nearly 16,000 on-farm camping pitches. The sector generated EUR 1.934 billion in output, up 3.3% on the previous year and more than double the 2020 figure, making it by far the largest single category of agricultural secondary activity in Italy: agritourism alone accounts for 37.7% of the total value generated by all secondary agricultural activities combined (ISMEA, 2026; ISTAT, 2026).

On the demand side, 2024 was a record year. Agritourism farms across Italy received 4.7 million guest arrivals — 4.3% more than in 2023 and 25.6% more than in 2019 — and 17.2 million overnight stays, a 3.2% increase on 2023 and 22.3% above pre-pandemic levels. Both figures are the highest ever recorded. Foreign visitors are a critical component of this demand, accounting for more than 50% of all arrivals and over 60% of overnight stays. In 2024, foreign arrivals reached approximately 2.5 million, up 8.6% on 2023 and 39.5% on 2019, confirming the strong and growing international appeal of the Italian agritourism experience (ISMEA, 2026).

The geographic distribution of the sector remains concentrated, though less so than in the past. Tuscany leads with 5,859 farms — 22.2% of the national total — followed by the Autonomous Province of Bolzano with 3,426 farms (13%). Together, these two territories account for more than a third of Italy's entire agritourism offer. A further seven regions — Piedmont, Lombardy, Veneto, Umbria, Lazio, Emilia-Romagna and Marche — each have more than a thousand farms. In recent years, the most dynamic growth has come from the South, and in particular from Sicily, which recorded an 8.9% increase in farm numbers in 2024 alone and a 38.5% increase since 2019 (ISMEA, 2026; ISTAT, 2026).

This growth is not only quantitative. The range of activities offered by agritourism farms has expanded significantly. Two thirds of farms now offer at least two types of services, and nearly a third offer three or more. Between 2023 and 2024, the fastest-growing activity categories were educational farm programmes (+12.2%), horse riding (+9%), nature observation (+8.9%) and trekking (+8%). This diversification reflects a broader shift in what travellers are looking for: authenticity, contact with nature, locally grown food, and experiences that cannot be replicated in a hotel or a city. Agritourism is, structurally, well positioned to respond to these demands — and Italian policy has, over time, actively supported that positioning.

The National Policy Framework

The Legislative Architecture

Italy's agritourism regulatory framework operates at two levels. The national framework law — Law No. 96/2006 — sets the general principles and the definitional boundaries of agritourism. Regional governments then hold the primary legislative competence to translate those principles into operational rules: licensing requirements, maximum capacities, permitted activities, connection ratios between agricultural and hospitality income, and so on. The result is a patchwork of twenty-plus regional laws, all anchored to the same national foundation but often differing significantly in their specifics. This architecture has produced both the sector's richness — different regions have developed distinctive regulatory cultures — and some of its inefficiencies, particularly in areas where national policy coordination would be beneficial.

The national law has remained substantially unchanged since 2006, but the policy ecosystem around it has evolved considerably. In recent years, several important developments have expanded the legal perimeter of agritourism-related activities, introduced new obligations for operators, and channelled significant public resources into supporting diversification investments.

Youth Entrepreneurship and Generational Renewal

One of the most structurally significant recent developments for the sector is Law No. 36 of 15 March 2024, on the promotion of youth entrepreneurship in agriculture. The law is framed as a general agricultural measure, but its provisions are directly relevant to agritourism, where generational succession has long been identified as a challenge. The law establishes a dedicated Fund of EUR 15 million per year from 2024 to support the first establishment of young agricultural entrepreneurs — defined as those between 18 and 40 years of age. It introduces preferential tax treatment, tax credits for training expenses, land pre-emption rights for young farmers and a national observatory to monitor youth employment in agriculture. For agritourism specifically, the law creates the legislative basis for the youth bonus provisions included in the CAP SRD03 grant scheme (discussed in the following section), which allow young operators to access higher rates of public co-financing for their investments (ISMEA, 2026).

The National Identification Code (CIN)

A more operationally immediate obligation for agritourism farms offering accommodation was the progressive enforcement of the National Identification Code (CIN), a digital registration system for all hospitality operators managed by the Ministry of Tourism. Originally introduced by Decree-Law No. 145/2023 (converted by Law No. 191/2023), the system was extended by the 2025 Budget Law (Law No. 207 of 30 December 2024), which required agritourism farms with accommodation to include their CIN also in their annual tax returns. The measure is part of a broader government effort to improve the transparency, traceability and statistical monitoring of the short-term and rural accommodation market, and brings agritourism into full alignment with the obligations applied to all other categories of hospitality operator in Italy (ISMEA, 2026).

Cadastral Rules for On-Farm Camping

Another recent regulatory change with direct operational implications for agritourism farms is the new cadastral treatment of mobile accommodation units — caravans, mobile homes, bubble rooms and similar structures — located in open-air reception areas. Decree-Law No. 113/2024 established that, from 1 January 2025, such structures are no longer classified as real estate units and therefore no longer carry a cadastral income or contribute to property-related taxes such as IMU. To compensate for this exclusion, the cadastral value of the land areas designated for camping was increased by up to 85%. Farm owners were required to file the necessary cadastral updates by 15 December 2025 — a deadline that had initially been set for June 2025 but was extended by the so-called Decreto Omnibus (D.L. No. 95/2025). Non-compliance triggers administrative sanctions ranging from EUR 1,032 to EUR 8,264. For the growing number of agritourism farms offering glamping or other nature-based accommodation formats, this regulatory clarification removes a long-standing area of legal uncertainty (ISMEA, 2026).

Renewable Energy, Wine Tourism and Organic Districts

Beyond these immediate operational measures, the national policy framework has also been active in three areas that shape the longer-term direction of the sector. The first is renewable energy: the agricultural sector has been an important actor in Italy's renewable energy expansion, supported by a combination of CAP rural development funds and NRRP resources. The 2024-2025 period saw the introduction of the FER X Transitorio Decree (Ministerial Decree of 30 December 2024), a transitional support mechanism for renewable electricity production from agricultural installations. For agritourism farms, access to photovoltaic systems, agri-voltaic installations and biomethane incentives represents an increasingly important source of income complementary to hospitality activities (ISMEA, 2026).

The second area is the progressive legal formalisation of wine tourism (enoturismo) and olive oil tourism (oleoturismo). By 2025, 17 Italian regions had transposed the national implementing decrees on these activities, giving them a dedicated regulatory status alongside — and in some regions incorporated into — the broader agritourism framework. This matters because wine cellar visits, olive mill tours and guided tastings are often the experiences through which visitors

first connect with rural territories, and agritourism farms are frequently the venues where they happen. Giving these activities their own legal identity creates new possibilities for licensing, promotion and quality certification (ISMEA, 2026).

The third area concerns organic farming districts. The national organic farming framework law (Law No. 23 of 9 March 2022) and the subsequent Ministerial Decree of December 2022 introduced a formal recognition system for organic districts — territorial governance structures in which farms, public institutions, businesses and citizens cooperate to integrate the multiple functions of agriculture within a defined area. By late 2025, approximately ninety such districts had been established across Italy, though not all had received formal recognition. The relevance of organic districts for agritourism is direct: many farms operating within recognised districts combine certified organic production with hospitality and tasting services, creating a distinctive quality positioning that is becoming an important differentiator in an increasingly competitive rural tourism market (ISMEA, 2026).

The ISMEA 2026 Report also highlights the significance of the UNESCO recognition of Italian Cuisine as an Intangible Cultural Heritage of Humanity, obtained in 2025. While not a policy measure in the strict sense, this recognition has important policy implications: it gives the Italian government, regions and sector associations a powerful international platform from which to promote the agritourism offer, and it validates the narrative — long central to Italian agricultural policy — that food, landscape and farming traditions are inseparable cultural assets.

CAP 2023–2027: The SRD03 Intervention

The most direct financial policy instrument supporting agritourism investment in Italy is the SRD03 intervention of the CAP 2023-2027 Strategic Plan, dedicated to investments for diversification into non-agricultural activities. Structured around six activity types — agritourism (Action A), social farming (B), educational activities (C), on-farm processing of non-Annex I products (D), wine and olive oil tourism (E), and forestry and aquaculture (F) — the intervention is managed at regional level, with each region designing its own calls for applications within the parameters set by the national Strategic Plan.

Between January 2023 and December 2025, thirteen Italian regions issued calls under the SRD03 intervention for a combined total financial endowment — including EAFRD co-financing, national and regional contributions — of just over EUR 190 million. This represents approximately 70% of the EUR 280 million in total public expenditure planned for the full 2023-2027 programming period, indicating that implementation is broadly on track. The Autonomous Province of Bolzano chose not to activate the intervention within its CAP plan, preferring to use provincial resources instead (ISMEA, 2026).

Action A — agritourism — was activated by all thirteen participating regions, confirming it as the central axis of diversification support. Action B (social farming) was activated by ten regions, Action C (educational activities) by seven, and Actions D and E by seven each. In some regions, the initial budget allocation was supplemented mid-call to respond to higher-than-expected

demand: Veneto and Emilia-Romagna drew on other CAP interventions, while Lombardy added EUR 3.5 million from its own regional budget to the EUR 5 million initially allocated from EU and national sources. Sicily committed the largest single allocation, EUR 51.3 million across two rounds, accounting — together with Veneto's EUR 34.5 million across three calls — for a disproportionate share of national totals. An additional EUR 31 million was made available by Puglia, Lazio and Calabria under the preceding 2014-2022 programming period, extending diversification support beyond the SRD03 framework (ISMEA, 2026).

Grant rates under SRD03 vary across regions and actions, ranging from a minimum of 30% to a maximum of 65% of eligible expenditure. The base rate for agritourism (Action A) is typically 40-50%, rising to 60-65% for social farming and educational activities, reflecting the higher social value attributed to these activities. On top of the base rate, regions have introduced a range of targeted modulations: six regions add 10% for investments in mountain or disadvantaged areas; five regions provide a 10-20% bonus for projects submitted by young farmers; three regions add 5-10% for structural investments in buildings; and additional bonuses for sustainable construction techniques have been introduced in Marche and Trento. Sicily has taken a different approach, offering size-based bonuses of 10% for medium enterprises and 20% for small ones. This layering of incentives reflects the attempt to use the financial instrument not just to support investment in the aggregate, but to direct public resources towards specific policy priorities: generational renewal, territorial cohesion, and sustainability (ISMEA, 2026).

Regional Legislative Developments

While national legislation sets the framework, it is at regional level that agritourism policy becomes operational. The ISMEA 2026 Report documents a wave of regional legislative updates introduced between late 2024 and the first half of 2025, with eight regions amending their agritourism laws — a sign of a sector in active regulatory evolution.

The most conceptually interesting update came from Umbria. Regional Law No. 23 of 28 October 2024 amended the region's 2015 agritourism framework law to formally recognise a third type of agritourism accommodation, alongside the traditional categories of rooms in rural buildings and on-farm camping. The new category covers what the law calls "innovative complementary solutions" permitted under regional tourism legislation: lightweight, modular or mobile residential units such as prefabricated micro-homes, eco-compatible huts, bubble rooms and tree houses. These structures may be installed in addition to traditional agritourism buildings, up to a maximum of eight bed places, provided they remain genuinely complementary and do not substitute the farm's primary accommodation offer. This update is significant because it explicitly incorporates glamping and nature-based hospitality innovations within the agritourism regulatory framework, rather than treating them as a separate category — a decision that reflects both market realities and a deliberate policy choice to keep these premium experiences anchored to the agricultural enterprise (ISMEA, 2026).

Veneto moved in a different direction, addressing the built environment rather than new accommodation types. Regional Law No. 27 of 5 November 2024 introduced a one-off

volumetric exception for existing buildings to be used for agritourism, allowing an increase of up to 10% of existing volume (and no more than 200 cubic metres) for technological, hygiene and sanitary adaptations and the removal of architectural barriers. The measure is intended to ease the structural upgrading of agritourism facilities without requiring full planning permission for new construction — a pragmatic response to the fact that many Veneto farms operate in historic rural buildings that were not originally designed for hospitality use (ISMEA, 2026).

Lazio made two separate amendments to its 2006 agritourism law within a single month at the end of 2024. The first expanded the list of activities licensable under an agritourism permit — explicitly adding wine tourism, olive oil tourism, equestrian tourism and craft beer production — and raised the maximum permitted accommodation capacity from 50 to 70 bed places. The second addressed the sourcing rules for agritourism restaurants, eliminating the previous mandatory minimum percentages of on-farm produce and replacing them with a codified hierarchy: farm produce first, then locally certified products. This change acknowledges the practical difficulty of meeting strict self-sufficiency requirements in larger operations while maintaining the spirit of territorial food connection (ISMEA, 2026).

Lombardy tightened its rules in the opposite direction, strengthening the agricultural connection requirements for buildings used for agritourism. Regional Law No. 4 of November 2023, implemented in 2024, introduced the condition that the farm's landholding must have included the relevant building for at least three years, and eliminated the previous possibility of using buildings physically detached from the main farm holding. The reform reflects a concern that the agritourism label was being applied to hospitality operations with only a tenuous link to agricultural activity (ISMEA, 2026).

Beyond agritourism-specific updates, seven regions also amended their legislation on social farming in 2024–2025. Governed nationally by Law No. 141/2015, social farming — the provision of social, health and educational services through agricultural activities — has grown rapidly, with 483 registered operators across Italy in 2025, a 47.7% increase on the previous year. This growth partly reflects genuine sectoral expansion and partly the progressive activation of regional regulatory frameworks that give the model a clearer legal identity. The interaction between social farming and agritourism is direct: many farms carry out both, under a single enterprise, creating synergies between hospitality income and public service contracts.

Focus on Umbria

Umbria is a small, landlocked region in central Italy — roughly 8,500 square kilometres, with a population of under 900,000 — yet it consistently ranks among the top five Italian regions by number of agritourism farms and outperforms considerably larger territories on several quality and intensity indicators. A closer look at Umbria is warranted both as a concrete regional illustration of the national policy dynamics described above and as direct context for the project partnership.

The Tourism Picture

The broader tourism context provides an important starting point. In 2024, Umbria recorded 2,783,833 arrivals and 7,318,133 overnight stays in its accommodation facilities — both all-time highs since records began. Overnight stays grew by 6.4% on 2023 and by 19% compared to 2019. The international component is growing particularly fast: foreign arrivals increased by 10.1% in 2024, and foreign overnight stays by 11.6%. According to the Agenzia Umbria Ricerche (AUR), the long-term trajectory is structurally positive: from 5.7 million overnight stays in 2004 to 7.3 million in 2024, with a growth trajectory interrupted only by extraordinary events — the economic crisis of 2009, the 2016 earthquake, the pandemic — but always recovering strongly (Regione Umbria, 2024; AUR, 2025).

The coming years are expected to sustain this momentum. The 2025-2026 Catholic Jubilee and the 800th anniversary of the death of Saint Francis of Assisi in 2026 are generating strong additional visitor flows towards Umbrian destinations — above all Assisi, Perugia, Orvieto and Spoleto — and AUR projects that the region may exceed 3 million arrivals and 8 million overnight stays for the first time within the decade (AUR, 2025).

The Agritourism Sector

Within this growing tourism system, agritourism occupies a structurally important and distinctive position. In 2024, Umbria had 1,322 authorised agritourism farms — 5% of the national total — placing it fifth in Italy by farm numbers, a remarkable result for a region covering just 2.8% of the national territory. The territorial density of 15.6 farms per 100 square kilometres is second in Italy only to Tuscany (25.5) and the Autonomous Province of Bolzano (46) (ISMEA, 2026).

What truly distinguishes Umbria within the national landscape is not the quantity of its farms but the specific character of its offer. The most striking indicator is the share of farms offering accommodation: 96% of Umbrian agritourism farms provide overnight stays, the highest proportion in Italy against a national average of 81%. This is a reflection of a historically consolidated positioning of Umbria as a destination for extended rural stays rather than day visits. Guests who come to the Umbrian countryside tend to stay for several nights, and agritourism is the accommodation type that captures this demand most effectively. The average capacity confirms this picture: Umbrian farms offer an average of 17.2 bed places each, compared to the national average of 14.5, with a total endowment of 21,894 bed places across 1,274 farms with accommodation (ISMEA, 2026).

The offer is also diversifying rapidly. In 2024, the number of farms offering tasting experiences grew by 18.2% (reaching 396 farms), farms with recreational, cultural and sports activities increased by 18% (611 farms), restaurant seats grew by 8.8% (16,081 total), and on-farm camping pitches increased by 17.4% (216 pitches). These growth rates are all substantially above national averages for the same activity categories and signal a sector in active transformation: moving from a predominantly accommodation-centred model towards a richer, more

experience-oriented offer that integrates local food, outdoor activities, culture and landscape (ISMEA, 2026).

A particularly telling indicator of the sector's market orientation comes from digital platform data. In November 2025, ISMEA monitored the presence of agritourism farms on booking.com across all Italian regions. Umbria emerged as the region with the highest incidence of agritourism listings relative to total accommodation: 464 farms, equal to 9.2% of all properties listed in the region — nearly double the share recorded in Tuscany (5.3%) and significantly above the national average. This figure tells us that Umbrian agritourism operators have embraced digital distribution channels at a rate unmatched elsewhere in Italy, and that agritourism has an unusually prominent weight within the region's overall accommodation offer (ISMEA, 2026).

Policy Context

On the policy side, Umbria's regional law update — Regional Law No. 23 of October 2024, described in the previous section — opens the door to innovative accommodation formats (glamping, eco-cabins, bubble rooms) that respond precisely to the segments of travellers most attracted to rural Umbria: nature-seekers, couples and experience-oriented tourists willing to pay a premium for distinctive, design-led rural settings. The law keeps these new formats within the agritourism regulatory perimeter, ensuring they remain connected to the agricultural enterprise rather than drifting into generic rural real estate.

On financial support, Umbria's SRD03 call (May-December 2025) made EUR 3.5 million available exclusively for agritourism investments (Action A), with a maximum grant rate of 60% and a 10% bonus for young entrepreneurs. The relatively modest budget — among the smallest of the participating regions — reflects Umbria's small size and the relative saturation of an offer that is already dense and well-established. The policy priority in Umbria is therefore less about expanding farm numbers and more about supporting the quality upgrading and diversification of an existing supply base (ISMEA, 2026).

In terms of the broader agricultural economy, connected activities — including agritourism — represent 25.2% of the total value of regional agricultural output, the second-highest share among Central Italian regions after Tuscany (26.1%) and well above the national average. In 2024, these activities grew by 5.7% in Umbria, slightly above the national growth rate of 5.4%. The region's agricultural base — 454,558 farms across 484,761 hectares of utilised agricultural area — provides the foundation for an agritourism offer built on some of Italy's most distinctive productions: extra-virgin olive oil, black truffle, Sagrantino wine, lentils, cured meats and artisan cheeses, many of which carry PDO or PGI certification and are integral to the agritourism experience (ISMEA, 2026).

Concluding Observations

Italian agritourism in 2024 presents a picture of sustained growth, structural resilience and active policy engagement. The record figures on overnight stays and sector output are not the

product of a single favourable year but of a three-decade trajectory of gradual expansion, supported by a legislative framework that has consistently protected the agricultural identity of the sector while giving it sufficient flexibility to evolve.

The policy developments of the 2024-2026 period documented by ISMEA reveal a sector that is being actively shaped by multiple, sometimes converging forces: the push for digital transparency (CIN obligations), the need to accommodate new accommodation formats (the Umbria and Veneto regional laws), the drive to attract younger generations (the youth entrepreneurship law and SRD03 bonuses), the integration of sustainability concerns (renewable energy incentives, organic districts), and the growing recognition of food culture as a strategic asset (wine tourism regulation, UNESCO recognition). Each of these represents a policy choice with consequences for the competitive positioning and long-term direction of the sector.

Umbria's case illustrates both the strengths and the specific challenges of a mature agritourism territory. It has exceptional intensity, a distinctive offer centred on quality accommodation and local food, strong international appeal and growing digital visibility. What it needs — and what current policy is, imperfectly but purposefully, trying to provide — is continued investment in quality, support for the generational transition, and the legislative flexibility to incorporate new forms of rural hospitality without losing the agricultural anchor that gives them meaning.



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