



Funded by
the European Union



#AGRI&TOUR - Boosting Agritourism with Youth Power

MARKET RESEARCH ON AGRITOURISM



Index

MARKET RESEARCH ON AGRITOURISM IN IRLAND	3
Introduction	4
Research Approach	4
Demand Analysis	6
Sociodemographic profile of the tourist	7
Motivations and expectations.....	8
Consumption and spending behaviour	8
Satisfaction and loyalty level.....	9
Supply Analysis.....	10
Typology of farms and services	11
Capacity, prices and seasonality	12
Marketing channels.....	13
Professionalisation and digitalisation	13
Environment and Market Analysis	14
PESTEL analysis.....	14
Competitors analysis.....	18
Entry barriers and opportunities.....	18
Sustainability and Impact	19
Local economic impact.....	20
Social and cultural impact	20
Environmental impact	21
Alignment with rural development policies.....	22
Trends and Future Scenarios.....	22
Innovation in agritourism.....	22
New demand segments.....	23
Potential growth scenarios	24
Conclusions and Recommendations	25
Summary of results	25
Strategic recommendations	26
Design of agritourism support programmes.....	28
References.....	29



Funded by
the European Union



MARKET RESEARCH ON AGRITOURISM IN IRLAND



TUS



Associazione
Sviluppo Rurale

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.

References

- #AGRI&TOUR (2025) *Project Application Form, Annex III*. Erasmus+ KA220-HED.
- AgriNext (2024) *Agricultural and Rural Excellence Incubator and Platform for the Exchange of Competencies*. Erasmus+ project. Available at: <https://www.agri-next.eu/> (Accessed: 17 May 2026).
- Boland Murphy, M. (2026) Interview with the author, 20 May.
- Bord Bia (2026) *Export Performance and Prospects 2025–2026*. Dublin: Bord Bia. Available at: <https://www.bordbia.ie/globalassets/bordbia.ie/performance--prospects/bord-bia-export-performance-and-prospects-report-2025---2026.pdf> (Accessed: 21 May 2026).
- Caslin, B. (2024) *Branching Out: A Guide to Farm Diversification in Ireland*. Carlow: Teagasc.
- Caslin, B. (2026) Interview with the author, 25 May.
- Cawley, M. and Gillmor, D.A. (2008) 'Integrated rural tourism: concepts and practice', *Annals of Tourism Research*, 35(2), pp. 316–337.
- Central Bank of Ireland (2025) *National Claims Information Database: Report on Employers' Liability, Public Liability and Commercial Property Insurance*. Dublin: Central Bank of Ireland.
- CSO (2022) *Census of Agriculture 2020 — Detailed Results*. Dublin: Central Statistics Office. Available at: <https://www.cso.ie/en/csolatestnews/pressreleases/2022pressreleases/presstatemencensusofagriculture2020-detailedresults/> (Accessed: 18 May 2026).
- CSO (2024) *Farm Structure Survey 2023 — Key Findings*. Dublin: Central Statistics Office. Available at: <https://www.cso.ie/en/releasesandpublications/ep/p-fss/farmstructuresurvey2023/keyfindings/> (Accessed: 19 May 2026).
- CSO (2025) *Household Travel Survey Quarter 1 2025*. Dublin: Central Statistics Office. Available at: <https://www.cso.ie/en/releasesandpublications/ep/p-hts/householdtravelsurveyquarter12025/> (Accessed: 19 May 2026).
- CSO (2026) *Inbound Tourism: monthly releases December 2025 and March 2026*. Dublin: Central Statistics Office. Available at: <https://www.cso.ie/en/statistics/tourismandtravel/inboundtourism/> (Accessed: 19 May 2026).
- DAFM (2022) *Food Vision 2030: A World Leader in Sustainable Food Systems*. Dublin: Department of Agriculture, Food and the Marine.
- DAFM (2026) *Minister Heydon issues a call for proposals for Agri-Food Tourism Initiatives*. Press release, 23 January. Dublin: Department of Agriculture, Food and the Marine. Available at: <https://www.gov.ie/en/department-of-agriculture-food-and-the-marine/press-releases/minister-heydon-issues-a-call-for-proposals-for-agri-food-tourism-initiatives-2026/> (Accessed: 14 May 2026).
- DETE (2025) *Short-term letting in Ireland — what you need to know*. Dublin: Department of Enterprise, Tourism and Employment. Available at: <https://enterprise.gov.ie/en/what-we-do/trade-investment/tourism/short-term-letting/> (Accessed: 21 May 2026).

- DRCD (2022) *Our Rural Future: Minister Humphreys announces details of new €180 million LEADER Programme*. Press release, 27 October. Dublin: Department of Rural and Community Development. Available at: <https://www.gov.ie/en/department-of-rural-and-community-development-and-the-gaeltacht/press-releases/our-rural-future-minister-humphreys-announces-details-of-new-180-million-leader-programme/> (Accessed: 20 May 2026).
- D/TCAGSM (2024) *Tourism Development Policy Framework 2025–2030*. Dublin: Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media.
- Edgill, M. (2024) *Agriculture & Tourism Synergy: Paving the Way for Farm Diversification and Rural Prosperity*. Nuffield Ireland Farming Scholarships.
- Edgill, M. (2026) Interview with the author, 21 May.
- European Travel Commission (2026) *Long-Haul Travel Barometer 1/2026*. Brussels: European Travel Commission and Eurail. Available at: https://etc-corporate.org/uploads/2026/02/ETC_Press-release_Long-Haul-Travel-Barometer-1_2026.pdf (Accessed: 29 May 2026).
- European Union (2024) *Regulation (EU) 2024/1028 of the European Parliament and of the Council of 11 April 2024 on data collection and sharing relating to short-term accommodation rental services and amending Regulation (EU) 2018/1724*. Official Journal of the European Union.
- Fáilte Ireland (2025a) *Key Tourism Facts 2024: National Summary*. Dublin: Fáilte Ireland.
- Fáilte Ireland (2025b) *Tourism Barometer: Strategic Research and Insight, September 2025*. Dublin: Fáilte Ireland.
- Fáilte Ireland (2026) *Short-Term Letting Register*. Available at: [https://www.failteireland.ie/registration-and-grading/short-term-letting-register-\(STLR\).aspx](https://www.failteireland.ie/registration-and-grading/short-term-letting-register-(STLR).aspx) (Accessed: 16 May 2026).
- Government of Ireland (2021) *Our Rural Future: Rural Development Policy 2021–2025*. Dublin: Government of Ireland.
- Haugen, M.S. and Vik, J. (2008) ‘Farmers as entrepreneurs: the case of farm-based tourism’, *International Journal of Entrepreneurship and Small Business*, 6(3), pp. 321–336.
- Houses of the Oireachtas (2023) *Developing Rural Tourism in Ireland*. Report of the Joint Committee on Tourism, Culture, Arts, Sport and Media. Dublin: Houses of the Oireachtas.
- Irish Local Development Network (2021) *ILDN call for a sustainable LEADER budget 2023–2027 and a reversal of successive cuts to rural funding*. Available at: <https://ildn.ie/ildn-call-for-a-sustainable-leader-budget-2023-2027-a-reversal-of-successive-cuts-to-rural-funding/> (Accessed: 20 May 2026).
- O’Dwyer, J. (2026) Interview with the author, 15 May.
- OECD (2026) *Rural Policy Review of Ireland 2026*. OECD Rural Studies. Paris: OECD Publishing. Available at: <https://doi.org/10.1787/d53ea78f-en> (Accessed: 14 May 2026).



- Power, J. (2024) *An Analysis of the Self-Catering Sector in Ireland*. Dublin: Irish Self-Catering Federation. Available at: <https://iscf.ie/jim-power-report-analysis-of-self-catering-sector-ireland/> (Accessed: 14 May 2026).
- Robinson, J. and O'Connor, N. (2013) 'Ballyhoura—A Case Study of Cohesive Rural Tourism Planning in Ireland', *Tourism Planning & Development*, 10(3), pp. 307–318. doi:10.1080/21568316.2012.747988
- Schilling, B.J., Sullivan, K.P. and Komar, S.J. (2012) 'Examining the economic benefits of agritourism: the case of New Jersey', *Journal of Agriculture, Food Systems, and Community Development*, 3(1), pp. 199–214.
- STAY Project (2024) *Still Tourism Around Yard*. Erasmus+ project. Available at: <https://stay-erasmus.eu/> (Accessed: 7 May 2026).
- Teagasc (2024a) *Agritourism Bed and Breakfast*. Diversification Resources. Available at: <https://www.teagasc.ie/rural-economy/rural-development/diversification/agritourism-bed-and-breakfast/> (Accessed: 21 May 2026).
- Teagasc (2024b) *Exploring Farm Diversification: Agri-tourism*. Available at: <https://www.teagasc.ie/news--events/daily/farm-business/exploring-farm-diversification-agri-tourism.php> (Accessed: 21 May 2026).
- Teagasc (2025a) *National Farm Survey 2024 Final Report*. Athenry, Co. Galway: Teagasc. Available at: <https://teagasc.ie/publications/national-farm-survey-2024/> (Accessed: 21 May 2026).
- Teagasc (2025b) *Unlocking Ireland's Rural Income Potential*. Available at: <https://teagasc.ie/news--events/daily/unlocking-irelands-rural-income-potential/> (Accessed: 21 May 2026).
- Tourism Ireland (2025) *Overseas Sentiment Research, November 2025*. Dublin: Tourism Ireland. Available at: <https://assets.tourismireland.com/data/docs/default-source/sentiment-tracker-research/overseas-sentiment-research---november-2025.pdf> (Accessed: 27 May 2026).
- Tourism Ireland (2026) *Statement on CSO Inbound Tourism figures, Quarter 1 2026*.



Funded by
the European Union



#AGRI&TOUR - Boosting Agritourism with Youth Power



TUS



Associazione
Sviluppo Rurale