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MARKET RESEARCH ON AGRITOURISM



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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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