

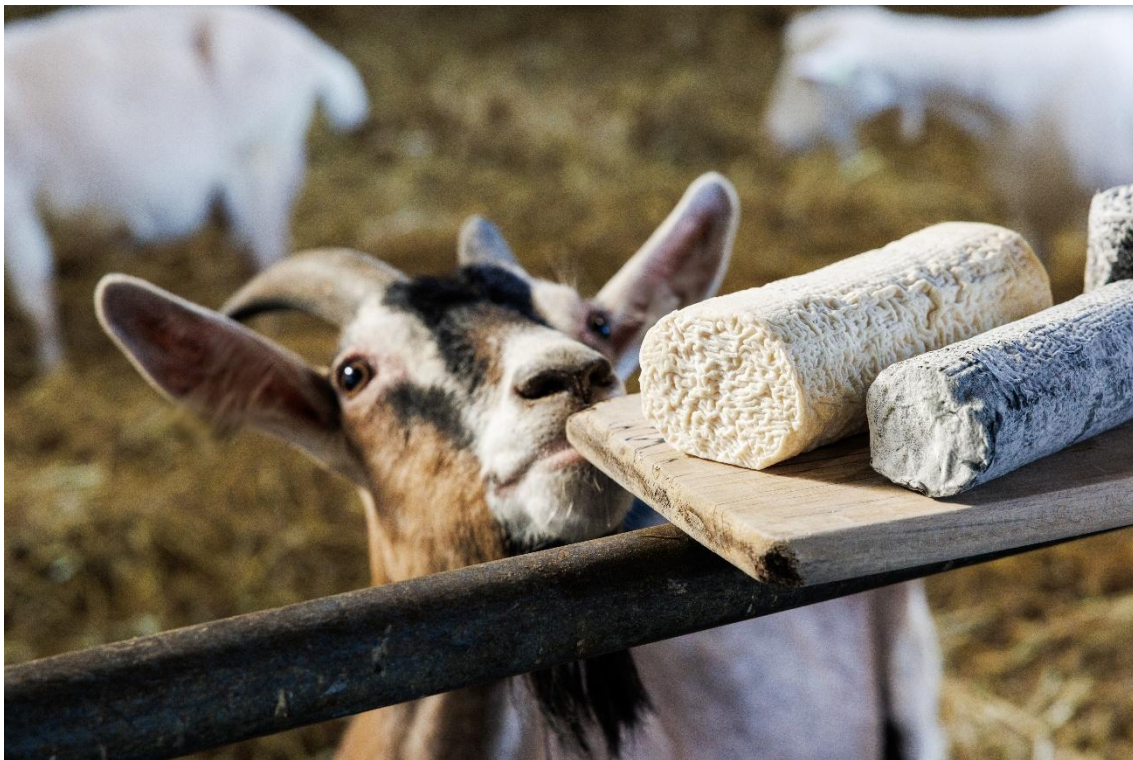


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#AGRI&TOUR - Boosting Agritourism with Youth Power

MARKET RESEARCH ON AGRITOURISM



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MARKET RESEARCH ON AGRITOURISM IN ROMANIA



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Introduction

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

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

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

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

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

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

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

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

Demand Analysis

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

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

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

Sociodemographic Profile of the Tourist

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

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

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

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

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

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

Motivations and Expectations

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

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

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

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

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

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

Consumption and Spending Behaviour

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

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

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

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

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

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

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

Satisfaction and Loyalty Levels

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

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

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

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

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

Concluding Remarks

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

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

Supply Analysis

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

Types of Agricultural Holdings and Services

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

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

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

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

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

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

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

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

Capacity, Prices, and Seasonality

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

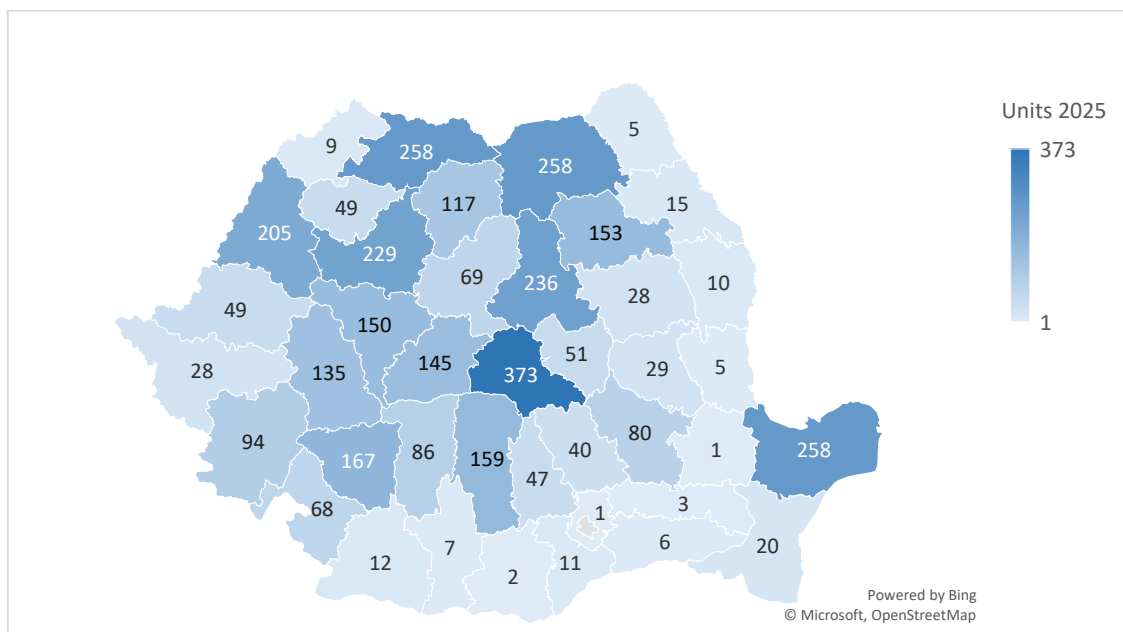


Figure. 1 Territorial distribution for the agritourism accommodation units

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

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

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

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

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

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

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

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

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

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

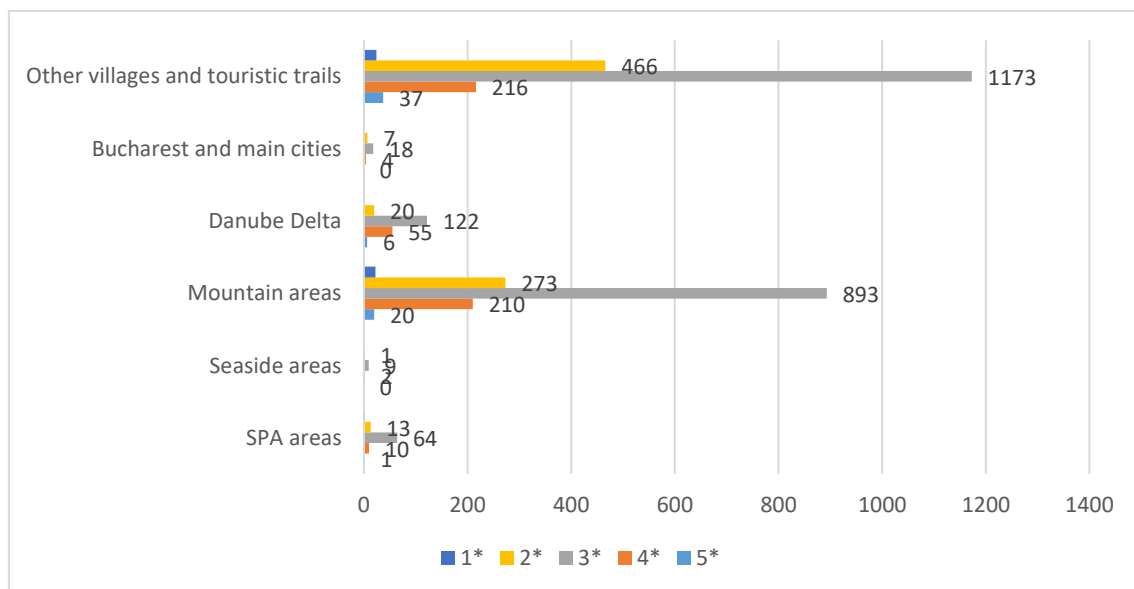


Figure. 2 Distribution of agritourist units by area and by comfort category

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

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

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

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

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

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

Marketing channels

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

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

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

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

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

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

Level of Professionalization and Digitalization

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

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

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

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

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

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

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

Environment and Market Analysis

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

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

Political factors

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

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

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

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

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

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

Economic factors

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

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

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

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

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

Social factors

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

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

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

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

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



Technological factors

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

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

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

Ecological factors

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

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

Legal factors

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

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

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

Competition Analysis

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

Barriers to entry and opportunities

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

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

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

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

Among the **opportunities** are:

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

Sustainability and Impact

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

Local economic impact

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

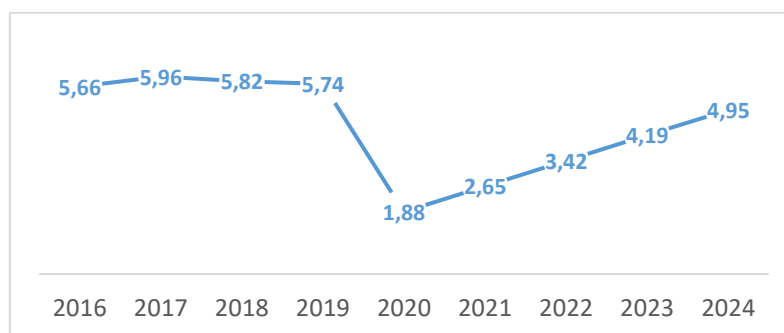


Figure 3: Share of the GDP of the tourism sector in Romania from 2016 to 2024

Source: STATISTA, Travel, Tourism & Hospitality

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

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

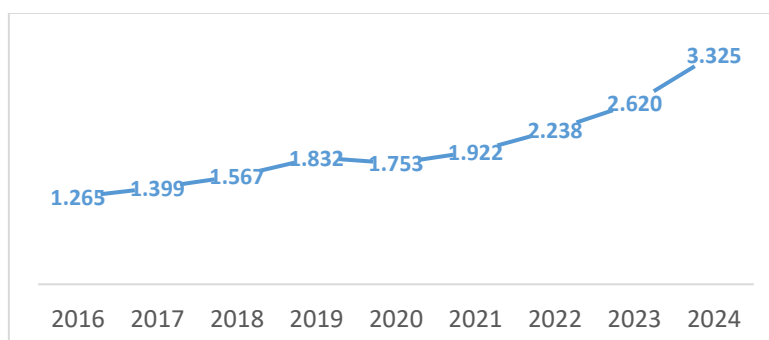


Figure 4: Average net monthly salary in the hospitality industry in Romania from 2016 to 2024 (in Romanian lei)

Source: STATISTA, Travel, Tourism & Hospitality

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

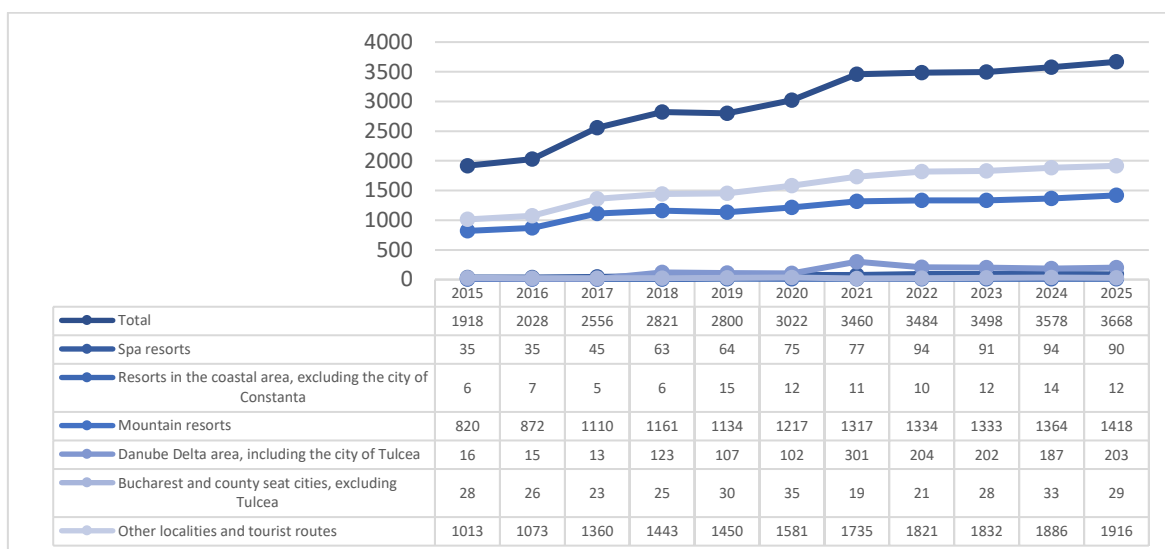


Figure 5: Number of agritourism guesthouses with accommodation functions by type of tourist destination

Source: National Institute of Statistics

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

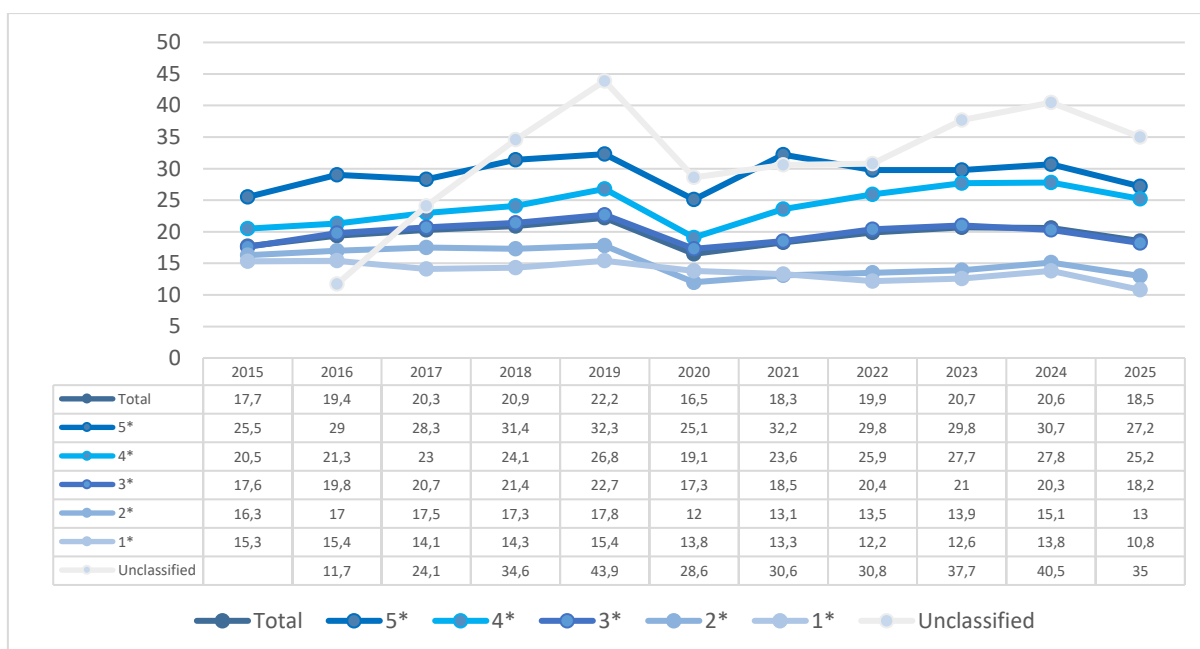


Figure 6: Net utilization index of agritourism accommodation capacity by comfort categories (%)

Source: National Institute of Statistics

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

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

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

Social and cultural impact

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

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

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

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

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

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

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

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

Environmental impact

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

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

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

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

Alignment with rural development policies

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

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

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

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

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

Trends and Future Scenarios

Innovation in Agritourism

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

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

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

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

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

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

New Demand Segments

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

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

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

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

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

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

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

5.3 Potential Growth Scenarios

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

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

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

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

Conclusions and Recommendations

Summary of Results

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

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

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

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

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

Strategic Recommendations

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

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

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

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

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

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

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

Design of Agritourism Support Programs

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

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

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

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

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

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



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