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#AGRI&TOUR - Boosting Agritourism with Youth Power

MARKET RESEARCH ON AGRITOURISM



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MARKET RESEARCH ON AGRITOURISM IN SPAIN

Introduction

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

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

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

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

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

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

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

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

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

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

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

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

Demand Analysis

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

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

Sociodemographic Profile of the Tourist

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

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

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

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

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

Motivations and Expectations

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

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

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

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

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

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

Consumer Behaviour and Expenditure

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

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

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

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

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

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

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

Satisfaction Levels and Loyalty

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

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

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

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

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

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

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

Supply Analysis

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

Types of Agricultural Holdings and Services

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

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

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

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

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

Capacity, Prices, and Seasonality

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

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

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

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

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

Marketing Channels

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

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

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

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

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

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

Level of Professionalization and Digitalization

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

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

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

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

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

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

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

Environment and Market Analysis

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

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

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

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

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

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

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

Political Factors

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

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

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

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

Economic Factors

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

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

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

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

Social Factors

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

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

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

Technological Factors

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

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



Legal Factors

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

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

Environmental Factors

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

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

Sustainability and Impact

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

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

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

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

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

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

Agritourism as a Rural Development Strategy

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

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

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

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

Local Economic Impact

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

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

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

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

Social and Cultural Impact

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

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

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

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

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

Environmental Impact

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

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

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

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

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

Alignment with Rural Development Policies

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

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

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

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

Challenges and Limitations of Agritourism

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

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

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

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

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

Trends and Future Scenarios in Agritourism

Innovation in Agritourism

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

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

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

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

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

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

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

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

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

New Demand Segments

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

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

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

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

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

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

Other notable segments include:

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

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

Potential Growth Scenarios

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

- *Scenario 1. Moderate growth based on value*

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

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

This model is characterized by:

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

○ *Scenario 2. Specialization and segmentation*

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

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

Key elements of this scenario include:

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

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

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

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

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

○ *Scenario 4. Risks and limitations*

Despite opportunities, the sector faces several significant challenges:

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

Conclusions and Recommendations

Summary of Results

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

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

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

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

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

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

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

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

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

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

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

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

Strategic Recommendations

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

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

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

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

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

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

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

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

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

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

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

Design of Agritourism Support Programs

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

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

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

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

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

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

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

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

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

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

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



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