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#AGRI&TOUR
Boosting Agritourism with Youth Power

MARKET RESEARCH ON AGRITOURISM IN ROMANIA, SPAIN, IRELAND, AND ITALY

SUMMARY REPORT



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Methodology

This summary report is based on the national market research previously drafted by the partners: ASE for Romania, UAL for Spain, TUS for Ireland, and ASR for Italy. For that purpose, the partners contacted several stakeholders and experts to gather information: national and regional governments, rural development bodies, universities, agriculture schools and research centres, farmer's associations, agri-food cooperatives, agriculture advisors and teachers, farmers, other experts and consultants, etc. As a result, they provide an overview of the current agritourism market and its evolution in their countries.

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

The summary report, drafted by COAG-Jaén, provides an analysis of the agritourism sector in each partner country as a synthesis of the national research and comparative analysis among territories.

The report marks a keystone for the #AGRI&TOUR project since it represents a step forward on improving the knowledge on agritourism with up-to-date research involving the main sector stakeholders and thus boosting the activity not only in our countries but in all Europe.

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

Agritourism: an introduction

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

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

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

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

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

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

Agritourism in Romania: an overview

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

Agritourism is regulated at national level, and responsibility lies with the Ministry of Tourism. Romania first regulated agritourism in 1994 with a tourist law, which included the concept of agritourism guesthouses and agritourism farms located in rural areas of the mountains, the Danube Delta and the Black Sea coast, extending this to the whole country in 1997. That initial law also included tax incentives for entrepreneurs.

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

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

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

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

Agritourism in Spain: an overview

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, despite official data at national level is not available. 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 travellers 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 favourable 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, the Farm to Fork Strategy, 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. There is no national regulation on agritourism nor rural tourism in Spain, since the legal competences relay on the regional authorities. Regulatory fragmentation between autonomous communities (so far only 10 on 17 regions consider agritourism in their rural tourism regulations) creates uneven standards and reduces visibility for the sector. Likewise, limited digitalization, weak commercialization strategies (no agritourism associations at national level, but a few at regional level), low levels of professional tourism training (no official VET or university programmes on rural tourism or agritourism are provided), and strong seasonality continue to constrain competitiveness. Beyond the specific details, the situation in the rural tourism sector applies equally to agritourism.

Climate change and environmental pressures also represent major risks, especially in Mediterranean regions, which affects agriculture, livestock breeding and therefore agritourism (i.e. crop losses, early or uneven harvests due to droughts, floods or pests), thus resource management is 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.

Agritourism in Ireland: an overview

There is no national regulation nor accounting of agritourism's contribution. Besides that, according to desktop research including a survey to rural entrepreneurs developed by TUS in the frame of the #AGRI&TOUR project, the demand-side signals for agritourism are favourable in direction. Visitor research and the operator and stakeholder accounts converge on nature, landscape, slow travel, disconnection and authentic rural experience. That is exactly the territory a farm-based offer occupies. The wider Irish tourism economy at over €10 billion in 2024 remains a large host market, according to official data.

The supply side is small and pluriactive. Most operators in the farmer survey ran the visitor enterprise alongside farming or as a seasonal sideline, with only one treating it as the main farm business. Trading is concentrated in the summer for most operators, which is also the busiest stretch of the farming year, so operators face peak farm work and peak visitor demand at the same time. Operators away from the main tourist corridors feel the short season most sharply. Such locations cannot generate the steady bed-nights that coastal or corridor sites can, so a short season leaves less scope to recover trade across the rest of the year.

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

The sector's impact is real but localised and largely unmeasured. Operator and stakeholder accounts point credibly to farm-household resilience, local supplier and visitor spend, rural retention and landscape stewardship, but the calculation that would turn this into a national figure has never been done.

The pipeline is positive in sentiment, uncertain in conversion. 88.57 % of farmers in the survey rated agritourism's potential as ‘very high’ or ‘some’, and 35.71 % reported they were starting shortly or seriously considering it. Whether this translates into results depends on the very same constraints –capital, planning, insurance, skills and time– that current operators report as the principal challenges to operating and growing.

A recurring theme across sections is coordination. Many of the ingredients of a functioning sector exist: visitor interest, willing farmers, some public funding, training providers, and supportive policy in principle. What is missing is a single body responsible for organising them around agritourism. No one owns the sector, so its supports stay scattered across several agencies that engage with it.

Agritourism in Italy: an overview

Italian agritourism in 2024 presents a picture of sustained growth (record year for agritourism ventures, arrivals, and output), structural resilience and active policy engagement. The record figures on overnight stays and sector output are not the product of a single favourable year but of a three-decade trajectory of gradual expansion, supported by a legislative framework (first National law passed in 1985, first regional laws passed in the 1970s) that has consistently protected the agricultural identity of the sector while giving it sufficient flexibility to evolve. Italy is one of the main agritourism markets in the world and one of the pioneers in Europe.

The policy developments of the 2024-2026 period documented by ISMEA (the Institute for Agricultural and Food Market Services, which produces the annual reports on agritourism and multifunctional agriculture in the country) reveal a sector that is being actively shaped by multiple, sometimes converging forces: the push for digital transparency (CIN obligations, a digital registration system for all hospitality operators), the need to accommodate new accommodation formats (the Umbria and Veneto regional laws), the drive to attract younger generations (the youth entrepreneurship law and SRD03 bonuses, which provide extra funding for youngsters), the integration of sustainability concerns (renewable energy incentives, organic districts), and the growing recognition of food culture as a strategic asset (wine tourism regulation, UNESCO recognition of Italian Cuisine as an Intangible Cultural Heritage of Humanity). Each of these represents a policy choice with consequences for the competitive positioning and long-term direction of the sector.

Umbria's case illustrates both the strengths and the specific challenges of a mature agritourism territory. It has exceptional intensity (1,322 agritourism farms, growing numbers both in arrivals and overnight stays), a distinctive offer centred on quality accommodation (96 % of Umbrian agritourism farms provide overnight stays, the highest proportion in Italy against a national average of 81 %) and local food (thus encouraging the consumption of local and regional products with geographical indications), strong international appeal (+10 % from last year’s figures) and growing digital visibility (this is the region with the highest presence in Booking.com for agritourism accommodations, almost twice the figures in Tuscany, the sector leader and significantly above the national average). What it needs –and what current policy is, imperfectly but purposefully, trying to provide– is continued investment in quality, support for the generational transition, and the legislative flexibility to incorporate new forms of rural hospitality without losing the agricultural anchor that gives them meaning.

Country comparison

The following table compares a few characteristics of the agritourism sector in the partner countries. As Spain and Ireland do not have specific official statistics for the agrotourism sector, market-related issues have not been considered.

	Romania	Spain	Ireland	Italy
National regulation*	Yes (2026)	No	No	Yes (2006)
Regional regulation	No	Yes (10 on 17)	No	Yes (All)
Grants for entrepreneurship	Common Agriculture Policy funds for rural tourism	Common Agriculture Policy funds for rural tourism	Common Agriculture Policy funds for rural tourism	Common Agriculture Policy funds for rural tourism agritourism
Taxing benefits	Yes	Yes	No	Yes
National Business Association	No	No	No	Yes (3)
National quality brand	Yes	No	No	Yes
Official data	Yes	No	No	Yes
Market size	3,668 ventures +61,000 beds 1.09 M arrivals 2.1 M stays	-	-	26,360 ventures +310,000 beds 540,000 restaurant seats 16,000 on-farm camping pitches 4.7 M arrivals 17.2 M stays EUR 1.934 billion in output
International reach	6.4 %	-	-	+50 % of arrivals +60 % of stays
Market trend**	Decline	-	-	Growing

* This is the year of the current regulation, but the topic was first regulated before.
**This assessment is based on data from the past year; therefore, longer periods will need to be considered to establish a reliable trend.

Key insights and strategic recommendations

As part of the research carried out in each country, the partners put forward a series of strategic recommendations aimed at agrotourism operators, industry associations, and public authorities to strengthen the competitiveness, sustainability, and long-term viability of agritourism. Below is a summary of the various recommendations, once they have been discussed and agreed upon:

1) Institutional and regulatory framework for agritourism

In those countries without a legal recognition for agritourism, at national level, such as Spain and Ireland, statistical monitoring, visibility, and targeted public support regarding agritourism is very limited. Legal background is crucial since it sets the rules of the game, that is, it stablishes what should be considered agritourism and how should it be developed according to the standards, but a national agritourism strategy or master plan (such as in Romania) with an assigned lead agency could really enhance the sector (improving market transparency, facilitating policy design, and strengthening consumer confidence) even without specific regulation. Cooperation between stakeholders is crucial, and territorial governance is key for a strong agritourism sector, both at local level and at higher levels.

Official data on agritourism supply is gathered in Italy and Romania, but not in Ireland and Spain. This is an obstacle for organising the sector, monitoring trends, developing differentiated marketing strategies, designing micro-niche package holidays, etc.

A quality brand at national level for agritourism ventures exist both in Italy and Romania, but not in Spain and Ireland. Those quality systems ensure a consistent standard of comfort and services, help to combat illegal operations and ease marketing actions.

2) Professionalization and training

Training is a key gap in the agritourism sector in many countries since there are no official specific training programmes on agritourism provided by universities or VET centres, thus rural entrepreneurs have very limited opportunities to get the knowledge, skills, and attitudes required for starting up and managing an agritourism venture. In Italy, the main farmers associations provide specific training on agritourism amongst their partners before becoming entrepreneurs, and Teagasc launched in Ireland the Options for Farm Families programme, a workshop series that helps farm families weigh farm diversification options and plan. Topics such as hospitality management, visitor experience design, marketing, customer service, sustainability management, and digital communication should be addressed, but a pathway centred on mentoring (a dedicated agritourism enterprise support service guiding rural entrepreneurs from first idea to operating business), peer learning and exposure to working operators, with formal training as one strand rather than the whole offer, would be even more appreciated. Moreover, the farming sector's ageing profile and uncertain succession call for a longer-term view.

3) Diversification of the tourism offer

Current trends on rural tourism highlight the importance of experiences above facilities. The accommodation is no longer the key element of the holidays, as it was years ago, but a standard. Thus, what makes the difference is what you experience, what you feel, how your holidays can do good for you. Thus, agritourism should focus on differentiated experiences linked to rural identity, such as activities following agricultural calendars, gastronomy, artisan production, guided heritage experiences, active outdoor programming, biodiversity, educational packages for adults and school groups, and wellness. Those activities can significantly increase added value and revenue per guest while reducing seasonality and providing opportunities for market differentiation.

Authenticity is a must for agritourism. Providing genuine and meaningful experiences rooted in rural culture and agricultural identity is the key to success, what makes this niche market different.

4) Reducing seasonality and enhancing internationalization strategies

Any tourism modality is usually seasonal, but while some niche sectors can hardly extend their season agritourism is a full-year activity (besides extreme weather conditions, of course). Moreover, when linking the activities for visitors to the farm calendar (e.g. sowing, pruning or harvesting season) or the countryside events (local fairs, festivals or gatherings), different agritourism packages can be offered throughout the year, not only during peak season.

Regarding internationalisation strategies in agritourism, they really depend on the context. Some territories in our countries counted a huge number of international tourist arrivals for decades, but agritourism is historically a domestic product: only in some Italian regions figure are around 50 %. International demand for sustainable and authentic tourism experiences, including agritourism, is growing fast and as such, it is an opportunity for some agritourism ventures, but hosting foreigners requires some features that not all destinations and operators are able to provide. Moreover, individual operators cannot effectively reach international markets independently; thus, a collective effort is essential: coordinated investment in multilingual digital platforms, participation in international rural tourism fairs and slow-food networks, development of thematic itineraries connecting multiple operators across regions, and active cultivation of relationships with incoming tour operators specializing in cultural, culinary, and sustainable travel.

5) Digitisation

Despite remote rural areas usually lack good access to TIC, digitisation is a fast-growing trend in the rural tourism sector. Thus, also for agritourism. Off-line operators are no longer competitive in a tourism market increasingly shaped by online platforms and social media. Agritourism businesses must improve their online presence, booking systems, digital storytelling, and reputation management capabilities, even establishing partnership with specialized rural tourism content creators and travel influencers for reaching young and

foreigner audiences, while public support programs are needed to ease access to digital tools, connectivity infrastructure, and technical assistance.

Remote workers, digital nomads, and corporate retreats for small and medium enterprises are interesting target groups who require good internet connectivity to be attracted to agritourism accommodations, and who would represent an interesting option for tackling the tourism seasonality in particular destinations.

6) Sustainability

In short, agrotourism is a way of enjoying a different kind of holiday, helping to keep traditional trades and the rural economy alive. However, at the same time, it includes a clear educational component, since it is based on the knowledge of the work and life in the countryside. Moreover, it takes place in working farms, thus sustainability is not a marketing concept but a real need, and agrotourism farming production is usually more environmental-friendly (e.g., in Italy 26.6 % of agrotourism farms have adopted organic production *vs.* 7.4 % in other farms according to official data from ISMEA, 2024). It must be integrated into operational practices, including water conservation, renewable energy, waste reduction, biodiversity protection, sustainable mobility, and local supply chains.

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