



# STAY

Still Tourism Around Yard

## SUMMARY REPORT



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#### List of contributors:

	<ul style="list-style-type: none"><li>• Jerneja Rozman</li><li>• Tina Cuderman</li><li>• Nina Kaličanin</li></ul>
	<ul style="list-style-type: none"><li>• Juan Carlos Muñoz Flores</li></ul>



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	<ul style="list-style-type: none"><li>• Zdenka Nosková</li><li>• Eduard Uher</li><li>• Lucie Ficková</li></ul>
	<ul style="list-style-type: none"><li>• Lucia Tacconi</li><li>• Righini Cosimo</li></ul>
	<ul style="list-style-type: none"><li>• Luis Amorim</li><li>• Sara Silva</li></ul>
	<ul style="list-style-type: none"><li>• Micaela Cosgrove</li><li>• Sergio Pedregosa Peris</li></ul>



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## INTRODUCTION

This brief document summarises the results of the surveys conducted by the Stay project partners regarding the articulation of agritourism within the respective countries.

The National Reports reveal a non-homogeneous situation within the countries investigated with data, numbers and definitions varying widely concerning agritourism.

In fact, at the European level, there is no common framework, let alone a strategy for developing this sector, which is often included within rural tourism, even though a marked link with the land and agricultural activity often distinguishes it.

Due to the Covid-19 pandemic, tourism in rural areas has increased, peaking in 2020 (39.4 %) of the total nights spent in EU tourist accommodation was in rural areas, while just over one-third (34.8 %) was spent in towns and suburbs, and just over one quarter (25.8 %) in cities (source: Eurostat, Tourism statistics at regional level).

Eurostat in 1998 defined rural tourism as: *“The activities of a person travelling and staying in rural areas (without mass tourism) other than those of their usual environment for less than one consecutive year for leisure, business and other purposes”*.

Since the 1970s, rural tourism has been a development strategy for many rural territories, allowing the population to remain in the area, creating jobs and contributing to their development (Rajovic & Bulatović, 2017).

It is therefore no coincidence that in recent years diversification has become a prevalent strategy in agricultural development, made possible by measures and interventions in rural development programmes aimed at increasing farm multifunctionality (Almeida & Pinto Machado, 2021).

Public investment has, in fact, made it possible to support the renovation of farm buildings and rural houses into accommodation facilities for tourists, representing an important source of income for farmers (Sharpley & Vass, 2006).

Nowadays, nearly 8% of the total output of the agricultural industry in terms of economic values is represented by inseparable non-agricultural activities (EUR 19.8 billion) (Source: Eurostat, 2022). Unfortunately, more detail on the contribution of rural tourism and agrotourism activity on agricultural income is not available at the European level and is complicated even when analysing individual states.



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The new European policy (CAP 2023-2027), launched in 2023, has focused on ten main points (Source: [agriculture.ec.europa.eu](https://agriculture.ec.europa.eu))

- ensuring a fair income for farmers;
- increasing competitiveness;
- improving the position of farmers in the food supply chain;
- acting to combat climate change;
- protect the environment;
- preserving the landscape and biodiversity;
- support generational change;
- develop dynamic rural areas;
- protect food quality and health;
- promoting knowledge and innovation.

Many of the objectives can also be realised by increasing the role of agritourism in national RDP, particularly for some European countries where there is still ample room for growth in the sector.



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## READING GUIDE

On the following pages, data from the various countries involved in the STAY project will be summarised: Czech Republic, Italy, Spain, Slovenia, and Portugal, and brief access to other European countries will be provided.

The factsheets of each country summarise the data contained within the National Reports to which we refer for further details and explanations.

The aspects to which the greatest attention was paid were:

1. The presence of a **definition** of agritourism;
2. The verification of the relative structural **requirements** for agritourism activities with particular reference to the link with agricultural activity;
3. An examination of **regional** or **national laws** regulating the sector;
4. An indication of the numerical **data** on the number of structures present within the country and their sources;
5. An assessment of the sector's growth **trends**;
6. Any **funding opportunities** present for businesses.

In order to facilitate the comparison of this data between the various countries, specific comparison tables were created that will make it easy to compare the points made above.

At the end of the work, a table was created in analogy with the SWOT methodology, which grouped together the main strengths and weaknesses and the threats and opportunities that characterise the sector for the context of the countries analysed. In particular, all aspects common to several countries were included in the analysis.

The application of the SWOT methodology to agritourism at a European level needs to be reflected in the literature, thus opening up the need for greater involvement of EU institutions in the analysis of this sector.

## DEFINITION

Agritourism is a form of tourism involving visitors experiencing and participating in agricultural activities on working farms or rural properties. The definition of agritourism can vary slightly from country to country, tailored to their local contexts and agricultural practices.

CZECH REPUBLIC	ITALY	SPAIN	SLOVENIA	PORTUGAL
<p>Agritourism is specified as a form of rural tourism that is run by agriculture entrepreneurs in primary agricultural production. In addition to the direct exploitation of nature, rural landscape and authentic culture it is characterised by a direct relationship to agricultural work or farmstead with an agricultural function.</p>	<p>Agrotourism activities are understood to be the reception and hospitality activities carried out by agricultural entrepreneurs through the use of their farms in connection with the activities of cultivation of the land, forestry and animal breeding (Source: National Law 96/2006)</p>	<p>Agrotourism is a type of rural accommodation linked to farming professions and the agrarian lifestyle.</p>	<p>In Slovenia, the Tourist Farm is classified as rural tourism or agrotourism. The definition of a tourist farm is not given in the regulation itself. However, the exact conditions that a farm with the accommodation must provide are listed, and it is regulated through a regulation: "Regulation on complementary activities on the farm (Official Gazette of the RS, No. 57/15, 36/18 and 151/22)".The regulation belongs under the Agriculture Act (ZKme-1).</p>	<p>An establishment located on farms, which is intended to provide accommodation services, allowing guests to follow and learn about the agricultural activity or participate in the work carried out therein by the rules established by the person in charge (Source: National Law n.39/2008)</p>

## Rest of Europe

### Germany

Agrotourism (**Ländlicher Tourismus**) is a **tourism offer in a rural region that covers stays with experiences at or near an agricultural enterprise**, is mainly **organised by farmers** and **allows the farming industry to generate additional income**. The main idea is the proximity to the host family, which comes into personal contact with the tourist and introduces him or her to the everyday life of the countryside.

### France

All the **tourist activities that take place on a farm** and **enable people to learn about farming activities and rural lifestyles**, and to consume the products of the farm. On-site accommodation is often available. (Journal officiel électronique authentifié n° 0142 du 18/06/2017).

### Sweden

A style of **vacation typically spent on farms**.

### The Netherlands

All forms of **recreation and tourism on functioning farms** and market gardens.

### Austria

Tourist farms are **active farms that supplement their primary agricultural function with some form of tourism activities**. The farm is the setting for **accommodation, hospitality and other products** provided to the tourist. One or more of the following can be enjoyed: (i) **on-farm accommodation** (e.g. bed and breakfast), (ii) **food services**, (iii) **direct participation in agricultural activities** (e.g. picking the grapes, milking a cow), (iv) **indirect enjoyment of farm activities** (e.g. enjoying meals on-site, picking an apple right off the tree, hearing goat bells ringing, watching grazing cows), and (v) **recreational activities in which the farm provides the landscape**, such as, e.g. relaxing from the daily grind in the organic sauna, finding refreshment wandering barefoot through the dewy pastures outside

## REQUIREMENTS

The requirements to run an agrotourism business in Europe can vary depending on the specific country and region. The table shown is a synthesis of the main requirements by country. A better understanding of the operational requirements National Report has explored into deep the theme and reported useful information and source for in-depth analysis

CZECH REPUBLIC	ITALY	SPAIN	SLOVENIA	PORTUGAL
Farmers must meet specific requirements and obtain permits from competent authorities to operate agrotourism.	Farmers must meet specific requirements and obtain permits from competent authorities to operate an agrotourism activity.  Requirements could change according to the regional legislation	To operate agrotourism, farmers must meet specific requirements (each autonomous community defines its standards by regulation) and obtain permits from competent authorities.	To operate agrotourism, farmers must comply with specific requirements/conditions and obtain authorisations from competent authorities to carry out complementary activities.	Farmers must meet specific requirements and obtain permits from competent authorities to operate agrotourism.

## Rest of Europe

### Germany

There are **no legal requirements for agrotourism establishments** in Germany. However, a **five-star classification system** is set up by the German Tourism Association, the **DTV classification**, which is voluntary for all tourism accommodations. The quality of those establishments is verified by checking a range of criteria (infrastructure, premises, services, leisure, and special features) every three years.

Another **seven quality marks** apply to rural tourism establishments, one of which applies specifically to agrotourism accommodations: the **quality-tested holiday farm**. The criteria that are assessed through this quality mark are:

- The holiday property is located in the spatial context of an active farm.
- The appearance of the courtyard ground is clean, tidy and in neat condition.
- Upon arrival, there will be a personal welcome, and the availability of the host is guaranteed.
- A farm tour is offered at least once a week.
- Products of regional origins are offered.
- At least four regular farm experiences are offered.

These criteria are revised every 3 or 4 years. As of December 2017, there are 1.100 participants.

There are also three other quality marks aimed at farms dedicated to specific activities: a quality-tested holiday fruit farm, a quality-tested holiday fish farm and a quality-tested holiday adventure farm.

### France

There are **no legal requirements** for agrotourism establishments in France. However, two associations bring together farms engaged in agrotourism: Accueil Paysan and Bienvenue à la Ferme. Each of them has its own requirements, mainly of an **ethical nature**, for accessing their networks and benefiting from their services.

These values are related to **sustainable agriculture** from a social, economic and environmental point of view; taking on the role of **ambassador of peasant life**; a **personalised treatment** of guests; and a constant and **supportive interaction with the territory** in which they operate.



## Sweden

There are **no legal obligations for agrotourism** establishments in Sweden. Despite that, a voluntary quality mark was created and managed by the most significant association of agrotourism farms in Sweden, Bo på Lantgård Sverige.

Every agrotourism farm is assessed in several areas and labelled as **1 to 5 Wheat Ears** based on quality. One single Wheat Ear means the farm met all the requirements to become a member of Bo på Lantgård Sverige. Five Wheat Ears mean the farm is of high quality and standard. Such farms would have a Bo på Lantgård Sverige logo visible on their farm and website.

The quality criteria are related to the **installations**, the **equipment**, and the **premises**.

## Austria

There are **no legal requirements** for an agrotourism establishment to be considered as such in Austria. However, **quality marks** established by the national association Urlaub am Bauernhof are voluntary for agritourism accommodations. A trademark is established by verifying compliance with quality criteria, **ranging from two (lowest quality) to five (highest quality) flowers**.

These quality criteria are set according to standardised specifications in **farm, equipment, and service quality**. Among other requirements, the agrotourism installations must comply with the following rules:

- The guest's accommodation must be **no more than 500 metres from the farm**.
- The appearance of the installations must be **clean and neat**.
- There must be a **maximum of 50 beds** per establishment.

## LEGISLATION

As well as for requirements also, legislation varies from country to country. There is no legal framework at the European level t, and the sector is not even mentioned in most of the CAP documents and reports. National Reports performed in the STAY project could be an available source of information regarding the current status of legal recognition of agrotourism in some European countries.

CZECH REPUBLIC	ITALY	SPAIN	SLOVENIA	PORTUGAL
No specific legislation on just agrotourism. A large number of regulations regarding rural tourism.	National Law 96/2006 regarding agrotourism provide definition, requirements and type of activity in agrotourism.  21 regional laws specify criteria and requirements for agrotourism located in the region	No specific national framework for agrotourism. 10 of 17 autonomous communities have approved regulations regarding agrotourism.	Agrotourism is defined in the Regulation on complementary activities (Official Gazette No. 57/2015), which defines the groups and types of complementary activities on the farm, their characteristics and scope, the content of the application for a licence to carry out a complementary activity, the entry in the register of agricultural activities, more detailed conditions for carrying out complementary activities, supervision and sanctions for infringements. The regulation is supported by Agriculture Act (ZKme-1)	Decree-Law. n.39/2008, national framework regarding Tourism in Rural Areas. The national law distinguishes between different categories of TRA: agrotourism, country house and rural hotel.

## Rest of Europe

### Germany

There is **no specific legislation on agrotourism** in Germany, neither at the federal nor regional level. No legislation on rural tourism either. Agritourism facilities must comply with **laws regulating agricultural practices, business entry requirements and tax legislation**.

### France

There is **no specific legislation about agrotourism** in France. **Law n. 2005-157 (23 February 2005)** related to the development of rural territories **contained several provisions aimed at promoting and supporting the multifunctionality of farms**, like the creation of the **CASDAR fund** to finance rural development initiatives. From a legal point of view, **agritourism businesses are considered to undertake agricultural activities** and, as such, are subject to legislation on agriculture.

### Sweden

Sweden **does not have specific national legislation or policy solely dedicated to agritourism**. However, various regulations and guidelines related to **agriculture, tourism, and land use** may apply to agritourism activities.

In Sweden, agriculture is regulated by the **Swedish Board of Agriculture (Jordbruksverket)**, which oversees farming practices, animal welfare, and environmental considerations. Farmers engaging in agritourism activities must comply with relevant agricultural regulations, such as those related to animal husbandry, food safety, and land management.

### The Netherlands

The Netherlands **does not have specific legislation or policy dedicated solely to agritourism**. However, some regulations and guidelines apply to agritourism activities within the existing **agriculture, tourism, and land use frameworks**.



In the Netherlands, agricultural activities are regulated by the **Ministry of Agriculture, Nature and Food Quality (Ministerie et al. en Voedselkwaliteit)** and various regional and local authorities. Farmers engaging in agritourism must comply with agricultural regulations related to animal welfare, food safety, and environmental impact.

Regarding tourism, the **Netherlands Board of Tourism and Conventions (NBTC)** promotes rural tourism experiences, including agritourism, as part of its destination marketing efforts. Regional tourism organisations may also provide guidelines and support for agritourism initiatives at the local level.

Municipal or provincial authorities can govern land use regulations in the Netherlands. Local zoning plans, environmental regulations, and agricultural development policies may influence the establishment and operation of agritourism activities on farmland.

## Austria

There is **no specific legislation on agrotourism** in Austria, neither at the federal nor regional level. No legislation on rural tourism either. Agritourism facilities are subject to the **2006 General Terms and Conditions of the Hotel Industry**.

## NUMBER OF STRUCTURES PER COUNTRY

Agrotourism is a significant and growing sector within the European tourism industry. However, not all the countries covered by the STAY project have updated data regarding the sector. Even the source of the data change from country to country. In order to do this, it is impossible to make a fair comparison between them.

CZECH REPUBLIC	ITALY	SPAIN	SLOVENIA	PORTUGAL
<b>315</b> agrotourism businesses (Official data-2016)	<b>25.390</b> agrotourism businesses (Official data-2022)	<b>3,196</b> agrotourism businesses (Official data 2020) (14,075 accommodations in rural houses)	more than <b>1355</b> agrotourism businesses (Official data-2023), more than 699 tourist farms with accommodation (2023)	<b>293</b> agrotourism businesses (Official data-2021)

## Rest of Europe

### Germany

There are **138.310 beds** available in **9.910 farms** in Germany. They are supplemented by **further 20.000 beds** on **camping sites and other rural sleeping facilities**.

### France

There is an absence of recent data regarding agrotourism in France. In 1996, it was estimated that there were approximately **15.000 farmers** engaged in agrotourism, offering **160.000 beds**. According to more recent sources (2011), **less than 3% of the farmers (around 17.000 farms)** offered any tourism-related activity.

### Sweden

No official data. Through Bo på Lantgård Sverige, there are **100+ member farms which provide accommodation** in a farm environment across the country. **0.6% of farms** in Sweden have participated in Agritourism activities. The income generation for these activities is considered minimal.

### The Netherlands

In 2009, **2.2 thousand farms had expansion activities in agritourism** in the Netherlands. Agritourism includes residential recreation, receiving visitors (for guided tours, in a café or restaurant) and the rental of recreational goods, recreational animals or recreational facilities. This means that tourists can go to **3 out of 100 farms**.

Most companies offering agritourism are **dairy farms (581 farms), other grazing livestock farms (443 farms), arable farms and horse and pony farms (both 315 farms)**.

## Austria

There are **63.818 beds available in 8.467 holiday farm establishments** in Austria (2018).

### DEMAND AND TREND OF THE SECTOR

Agrotourism is a significant and growing sector within the European tourism industry, driven by rising demand for authentic rural experiences. During the COVID-19 pandemic, the sector has faced challenges due to travel restrictions, reduced visitor numbers, and changes in consumer behaviour. However, as travel resumes and interest in rural and sustainable experiences grows, the agrotourism sector is expected to recover.

CZECH REPUBLIC	ITALY	SPAIN	SLOVENIA	PORTUGAL
Mostly families, groups of friends. The trend to book off-season vacancies and growing demand for experiential tourism.	12 million of guests in agritourism in 2022, coming mainly from foreign countries. A steady increase in the number of tourists and the sector's income has been reported in the last ten years.	Rural tourism accommodation offered, on average, 158,547 bed places. The typical traveller is a national tourist.	In 2019, 109,532 guests visited tourist farms (252,625 overnight stays).  The tourist farms of the Association of Tourist Farms of Slovenia have 5.851 beds available for guests.	Tourism in Rural Areas (TRA) establishments made around 24.5 thousand beds available in 2021. Most guests are Portuguese (76%), followed by Spanish, German and French (4%)

## Rest of Europe

### Germany

The number of **overnight stays** reached **1.500.000**. The **overnight stays per year on average are 112**: the region of Saxony-Anhalt has the highest average (121), while Baden-Württemberg, Bavaria and Saarland have the lowest (107).

Regional focal points are **Bavaria** (Alps and Pre-Alps), **Baden-Württemberg** (Black Forest), **Schleswig-Holstein** and **Lower Saxony** (North et al.). These four federal states together comprise about two-thirds of the national offer.

### France

The **average bed capacity is 8 to 12 beds**. The agrotourism establishments are concentrated in the **Pyrenees, the Alps, the Rhone Valley, the Mediterranean, and the Atlantic coast**.

The most typical customer profile is that of a **family from an urban environment** whose parents are **between 35 and 54 years of age**, with a **high academic and economic level** (a minimum of 2,200 euros per month).

### Austria

According to data from 2018, agrotourism establishments hosted **982.485 people** with an average stay of **5,7 days**. This is 31.54% more than the average time, calculated in days, that visitors spend on other types of tourist accommodations. The **overnight stays** in agrotourism installations reached **5.035.486**.

The agrotourism activity is concentrated in the **south and west of Austria, in mountainous regions near the Alps (Tyrol, Carinthia and Styria)**.

## FUNDING AND OPPORTUNITIES

Agrotourism development is supported by various European Union programs, regional funding initiatives, and national policies promoting rural development, sustainable tourism, and cultural preservation. However, the availability and types of subsidies can vary significantly from country to country. It is important to note that direct funding targeted explicitly at promoting agrotourism may be limited, and many funds are focused on promoting non-agricultural activities in general.

CZECH REPUBLIC	ITALY	SPAIN	SLOVENIA	PORTUGAL
<p>SUB-MEASURE 6.4.2 PROMOTION OF AGRITOURISM (RDP):</p> <p>This operation supports investments to diversify activities for agricultural operators in agritourism, leading to income diversification and job creation for unskilled labour to promote wider use of farms and the use of rural brownfields. This support does not apply for consumables, access roads, general costs as referred to in Article 45 of CoR (EU) No 1305/2013 and other expenditures not directly</p>	<p>At the Italian level, measures to sustain the agritourism sector can be found in Italy's RDP 2014-2022.</p> <p>Sub-measure 6.2 of RDPs provided subsidies to start-up businesses for non-agricultural activities in rural areas.</p> <p>Sub-measure 6.4 supports investments in creating and developing non-agricultural activities, including agritourism.</p> <p>In 2020 the total budget allocated by Italian Regions to sub-measures</p>	<p>European Agricultural Fund for Rural Development (EAFRD) or the European Regional Development Fund (ERDF) applied in Spain included support for agritourism initiatives.</p> <p>Funds are still being allocated to support the establishment of agrotourism enterprises in Spain under the LEADER 2023-2027 program. This financial assistance is channeled through Local Action Groups to promote rural development.</p>	<p>Within the CAP Strategic Plan 2023-2027 for Slovenia, € 1,798,311,677 is available.</p> <p>Of which:</p> <p>683,500,469 € for the first pillar of the CAP (direct payments, wine and beekeeping</p> <p>1,114,811,208 € for the second pillar of the CAP or rural development ( 550,850,960 € from the EU budget and 563,960,248 €</p>	<p>In Portugal, agrotourism and TRA are susceptible to some lines of incentive support, namely:</p> <ul style="list-style-type: none"> <li>-Support programs of the GAL - Local Action Groups;</li> <li>-Regenerate Territories Line (Turismo de Portugal, IP);</li> <li>-Offer Qualification Line - 2021 - Banking Protocol (Turismo de Portugal, IP + Financial Institutions) - for LDT- Low-Density Territories.</li> </ul>



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linked to the implementation of the project.

Contribution to the state budget of the Czech Republic from the Ministry for Regional Development programme.

Some occasional programmes of the State Agricultural Intervention Fund for constructing an agritourist guesthouse or other type of accommodation.

Random regional subsidies.

6.4 and 6.2 was €624 million, 3.4% of the entire RDP budget.

from the budget of the Republic of Slovenia).

In addition to own funding, various EU, national and municipal funds are also available.



## Rest of Europe

### Germany

The framework for rural development in Germany is established through **thirteen different regional programs** that set the priorities and the funding mechanisms for activities that enhance the development of rural communities and territories. The rural development programs (RPDs) from all thirteen regions include funds for **Local Development Strategies (LDS)** drawn up and implemented by **Local Action Groups (LAGs)** under the **LEADER approach**.

Germany received **1.6 billion euros** from the **EAFRD** for the year **2021**. For the years **2023-2027**, a further **1 billion euros** will be allocated to Germany **annually**.

Financial aid for agritourism is grouped under **measure 6 (farm and business development)** and, more specifically, under **sub-measure 6.4 (business start-up aid for non-agricultural activities in rural areas)**. The amounts allocated vary depending on the regions, which complement this financial support to the agrotourism activity with their own subsidies and credit lines.

### France

France received **2.3 billion euros** from the **EAFRD** for the year **2021**. For the years **2023-2027**, a further **1.5 billion euros** will be allocated to France **annually**. However, the Rural Development Program only vaguely mentions tourism as one of the fields of interventions prioritised, and is subject to the conservation of landscape and agricultural land.

On a national level, the French Ministry of Agriculture draws up the **National Rural and Agricultural Development Program of France**, but its implementation is handed over to the different regional **Chambers of Agriculture**, which then finances actions through the **CASDAR fund**. The third priority thematic area (**product quality and enhancement**) contains a sub-measure (**C.5 Supporting the creation of services on farms that enhance local resources**) that **explicitly cites agrotourism as one of the activities that can be financed by the CASDAR fund**.

### Sweden

Sweden channels financial aid to agrotourism establishments and initiatives through **44 Local Action Groups (LAGs)** which implement local development strategies following a **LEADER**, or “bottom-up”, approach.

This financial aid is grouped under **priority 6** of the EAFRD (**Social inclusion, poverty reduction and economic development in rural areas**). More specifically, the Swedish Rural Development Program projects the sub-priority related to diversification to get 117.9 million euros from public subsidies.

Sweden received **258 million euros** from the **EAFRD** for the year **2021**. For the years **2023-2027**, a further **211 million euros** will be allocated to Sweden **annually**.



## The Netherlands

The Rural Development Program of the Netherlands marks as a priority the **creation of new jobs and the improvement of living conditions in rural areas** through **Community Led Local Development (CDDL/Leader)** approach.

The Netherlands received **161 million euros** from the **EAFRD** for the year **2021**. For **2023-2027**, a further **73 million euros** will be allocated to the Netherlands **annually**.

## Austria

The priorities and objectives of rural development are set in Austria through its Rural Development Program (RDP). It is the basic framework in which activities that boost social inclusion and local development in rural areas receive financial aid coming from the EAFRD, complemented by other different national funds. The RDP is implemented following a **“bottom-up” approach through Local Development Strategies drawn up by 75 Local Action Groups (LAGs)**.

Financial aid for agritourism is grouped under **priority 6 (promoting social exclusion, poverty reduction and economic development in rural areas)**, with a focus on **diversification, support to SMEs and job creation**. Austria received **635 million euros** from the **EAFRD** for the year **2021**. For the years **2023-2027**, a further **520 million euros** will be allocated to Austria **annually**.



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## CZECH REPUBLIC

### Overview

Due to its history in the Czech Republic agritourism is a growing sector, but far away in terms of number and data compared with other neighbouring countries such as Poland or Slovenia. In the early nineties, the country was open to foreign tourists with great success in terms of numbers; in 2021 approximately 11.4 million tourists arrived in different accommodation establishments in the Czech Republic. Indeed, agrotourism has great potential to provide an alternative source of income for farmers, especially in rural areas where diversification opportunities are limited. However, there is not any national program aimed at promoting agritourism which is receiving more and more attention from both the general public and farmers.

### Specific legislation

There is no uniform definition of agritourism, however, stakeholders agreed to define agritourism: “a form of rural tourism that is run by agriculture entrepreneurs in primary agricultural production. In addition to the direct exploitation of nature, rural landscape and authentic culture it is characterised by a direct relationship to agricultural work or farmstead with an agricultural function”.

A large number of regulations concerning both tourism and agriculture could be related to agritourism, but not as a framework to act as a reference for the sector. Moreover, the rules are often unclear and contradictory

### Data regarding the sector

Depending on the definition applied to the counting system expert estimate between 600 to 1.000 agritourism. the variability in numbers changes when considering only farms providing accommodation or when considering also those offering tourist and experiential services. Official data from 2016 count 315 agritourism in the Czech Republic.

### Demand and trend

Official information and statistics on demand and trends of the sector cannot be found, due to the unwillingness of institutions at the national level to monitor the sector and the unwillingness of agritourism service providers to communicate information about themselves.

### Funding and opportunities

In the previous CAP programming period, the Czech Republic activated sub-measure 6.4.2 with the objective of supporting the diversification of farm production and supporting non-agricultural activities undertaken by farmers. Although these resources are not an exclusive source of funding, they can be used by farmers to set up agritourism activities.



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## ITALY

### Overview

From early begins, the agrotourism sector in Italy was strongly related to agriculture and in some regions of the country, it has become a relevant business helping the maintenance of rural areas as well as the development of itself.

Farms in rural and mountain areas do not merely represent an economic activity, but take a role and function in the maintenance of society and environmental protection. This multitasking role of agriculture is called multi-functionality and agrotourism development in Italy is one of the best examples of this.

The multifunctionality of agriculture can be defined as the capacity of the primary sector to produce secondary goods and services of various kinds, jointly and to some extent inevitably linked to the production of products for human and animal consumption.

### Specific legislation

Italy has adopted a framework law regulating agritourism, National Law No. 96 of 20 February 2006. This law plays a crucial role in defining and regulating various aspects of agritourism activities in the country. It provides a clear definition of agritourism and sets certain parameters and restrictions for operating an agritourism establishment. Regions and Autonomous Provinces have the authority to issue specific legislative measures to define and characterize agritourism activities at the local level.

In 2013, with the Ministerial Decree of 13 February 2013, Italy established the sector label, **Agriturismo Italia**. This label functions similarly to the star rating system used for hotels. The use of sunflowers as symbols provides the public with a general idea of the level of comfort, range of services, and quality of the environmental context offered by each agritourism farm.

### Data regarding the sector

In November 2022 there were **25,390 agritourism** in Italy (**+3.3% compared** to 2019) of which more than 1/5 in Tuscany. Of the total, about 80% of agritourism offers accommodation, about 50% provides catering and about 50% offers recreational and sports activities.

### Demand and trend

Attendances at Italian agritourism have grown steadily over time. Since the pandemic, demand for more isolated places has grown and the sector is currently growing. In 2021, over 12,000 overnight stays worth 1.1 million were recorded.

### Funding and opportunities

Sub-measure 6.2 and 6.4 of the Rural Development Program were activated in all the Italian regions. These specific funds were issued to promote of non-agricultural activities like agrotourism. In 2020 the total budget allocated by Italian Regions to sub-measures 6.4 and 6.2 was €624 million, 3.4% of the entire RDP budget. However, it is not possible to determine the exact amount of funds that have been invested in agrotourism activities based solely on the information provided.



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## SPAIN

### Overview

Tourism in Spain is a well-developed sector and the country in 2022 was the third in the world in terms of international tourist arrivals. Also, the agri-food sector is a driving force, it represents 5,5% of GDP. These two elements make Spain where the agrotourism sector can be an important source of income for farmers. Consumers are increasingly attracted to tourism that links relaxation with the possibility of concrete experiences, and so there is growing interest in agritourism, which can meet these new demands.

### Specific legislation

Agrotourism activity in Spain can be defined as “a type of rural accommodation linked to farming professions and the agrarian lifestyle”. However, there is no official definition and no framework law defining the sector at National level.

However, given the growing development of the sector, 10 regions (called Autonomous Communities in Spain) have approved so far rural tourism regulations at regional level which include specific references to agrotourism: Andalucía, Aragón, Castilla-La Mancha, Cataluña, Comunidad Foral de Navarra, Comunidad Valenciana, Galicia, Islas Baleares, País Vasco and Principado de Asturias. The various regulations have different approaches to the sector. For more details please refer to the Spanish national report.

### Data regarding the sector

According to the Agrarian Census, 3,196 agricultural buildings are used for agritourism. However, agrotourism also includes other activities not directly related to overnight accommodation. The number is therefore likely to be higher, with estimates of up to 5,000 structures involved in the provision of various services (catering, workshop and recreational activities at the farm level, involvement in farm activities).

### Demand and trend

Since the pandemic, there has been a growth in the number of beds in rural communities in Spain, reaching more than 158,000 in 2022 (Instituto Nacional de Estadística, 2022). Unfortunately, it is not possible to differentiate between types of accommodation, so the data for stays in agritourism is not available.

### Funding and opportunities

Funds are still being allocated to support the establishment of agrotourism enterprises in Spain under the LEADER 2023-2027 program. This financial assistance is channelled through Local Action Groups to promote rural development.



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## SLOVENIA

### Overview

Rural tourism is one of the most successful and rapidly growing sectors in Slovenia. It brings together various elements such as the countryside, rural heritage and traditions, eco-tourism, educational activities, and farming experiences. As part of its Sustainable Growth Strategy, Slovenia aims to position itself as a globally recognized green boutique destination, leveraging its diverse landscapes, rich natural resources, and cultural diversity.

The development of agrotourism has the potential to contribute to a sustainable tourism sector while also serving as a significant source of economic income. This is particularly important in light of the decline in the number of farms over the past two decades.

### Specific legislation

The Agriculture Act and Hospitality Act encompass and establish the necessary requirements for conducting tourism activities on a farm. Agrotourism is considered a complementary activity within the agricultural sector. As a result, certain conditions pertaining to land availability and annual income must be met in order to engage in this type of activity.

The regulations concerning complementary activities, including agrotourism, can be found in Uradni list RS, št. 57/15.

### Data regarding the sector

Farm tourism is divided into hospitality and non-hospitality tourism. The Association of Tourist Farms reported more than 900 farms involved in farm tourism and 661 with accommodation. In all the country there are more than 5,851 guest beds in tourist farms (3% of the total in the country) and around 36,000 seats if we count catering services.

### Demand and trend

Statistical Office of The Republic of Slovenia counted more than 109,500 guests on tourist farms in 2019. If you look at the nationality of the guest: 80% of the overnight stays in tourist farms were from international visitors. Conversely, the ratio of domestic and foreign guests visiting the farms as day guests on excursion farms, wine taverns, and eight-star farms are reversed.

### Funding and opportunities

A specific intervention to support various non-agricultural complementary activities, such as tourism activities, is present in the Slovenian CAP Strategic Plan 2023-2027. the support is up to 30% financing of the eligible costs (construction costs, renovation of immovable property, purchase of equipment and installations, etc.) of the investment. Other sources of funding opportunities are available from the Local Actions Groups, municipal and other national funds.



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## PORTUGAL

### Overview

In 1986, Portugal's legislation referred to tourism to rural space and mentioned the terms: Residential Tourism, Rural Tourism and Agrotourism. This was due to the growth of the rural tourism sector in the previous decade. In 2008, Decree-law n.39, set a new legal regime for the running of tourist accommodations providing also with a definition of the typologies of tourism accommodation including tourism in rural areas (TRA) in which agrotourism is included.

The total number of Tourism in Rural Areas (TRA) has been steadily increasing in the last decades, and in 2021, there were 1,455 active TRA establishments.

### Specific legislation

According to the Decree Law no. 39/2008, Agrotourism is an establishment intended to provide accommodation services in rural areas, having for its operation an adequate set of facilities, structures, equipment and complementary services, in order to preserve and enhance the architectural, historical, natural and landscape heritage of the respective region.

The legislation also establishes certain requirements for agrotourism. Guests should be allowed to learn about the agricultural activities carried out on the farm. Furthermore, the legislation sets requirements for the type of accommodation, including the number of rooms, minimum size, furniture, and the type of equipment that must be present in the accommodation.

### Data regarding the sector

In 2021, Tourism in Rural Areas (TRA) establishments provided approximately 24.5 thousand beds, with country houses accounting for 56.9% of the capacity in this accommodation segment. Rural hotels accounted for 21% of the capacity, followed by agrotourism units at 20.4%. Although TRA establishments represented around 22% of the total tourist accommodation offerings, they only comprised 6% of the total beds available. Consequently, agrotourism accounted for approximately 1.22% of the overall accommodation capacity with 293 units.

### Demand and trend

The majority of guests staying in agrotourism accommodations are national residents, making up approximately 76% of the total. This starkly contrasts with the overall tourist landscape, where residents typically account for around 52% of the total visitors.

### Funding and opportunities

In Portugal, agrotourism and rural tourism accommodation (TRA) can benefit from various lines of incentive support, including: Support programs of the GAL, Regenerate Territories Line (Turismo de Portugal, IP), Offer Qualification Line - 2021 - Banking Protocol (Turismo de Portugal, IP + Financial Institutions) - for LDT- Low-Density Territories. These incentives and funding opportunities aim to stimulate the growth and development of agrotourism and TRA in Portugal, contributing to the diversification and sustainability of rural economies.



## CONCLUSION AND SWOT ANALYSIS

Agritourism offers a unique opportunity to explore and engage with the rich agricultural heritage and diverse natural landscapes of rural areas. Due to this, the sector could be a strategic asset to promote rural development while preserving the culture and heritage of the community.

One of the highlights of agritourism is the availability of locally produced food and beverages. In addition to the agricultural aspect, agritourism destinations often boast cultural and historical attractions that enrich the overall tourism experience. One of the greatest strengths of agritourism lies in its potential to provide authentic and immersive experiences to visitors. Unlike conventional tourism, agritourism allows travellers to actively engage with the farming community. They can participate in agricultural activities such as harvesting crops, tending to livestock, or learning about sustainable farming practices.

However, agritourism encounters several challenges that hinder its growth and development. The lack of comprehensive data and information on agritourism at the national and European levels poses a significant hurdle. Policymakers do not have sufficient information to formulate effective strategies, identify trends, and make informed decisions to support and promote the sector.

Agritourism operators often face complex administrative procedures and regulations, which can be time-consuming. These procedures may include obtaining permits, licenses, complying with health and safety regulations, and navigating through various bureaucratic processes.

Complex procedures could be also challenging to adapt accommodations and activities to be accessible for individuals with disabilities or special requirements. Moreover, this adaptation requires investment, knowledge, and awareness especially if they are applied to existing buildings and amenities. Many rural areas where agritourism is prevalent suffer from inadequate infrastructure. Limited internet connectivity, poor road conditions, and insufficient public transportation options make it difficult for tourists to access and explore these regions.

In conclusion, the agritourism sector requires concerted efforts from policymakers, farmer stakeholders, and local communities. Enhancing data collection and analysis at national and European levels can provide valuable insights for policymakers to formulate targeted strategies. As well as a training program aimed to explore and provide useful and mean full information to the development of the sector.

SWOT analysis could be an effective synthesis of all the information and consideration addressed before. Therefore the one presented hereafter, has the aim to summarise all the points and draft all the opportunity as well as the threats that the agritourism sector have in Europe.

The source of information to draft the table were taken by analyzing the data provided among all the National Reports where a comprehensive assessment by the country for the sector was undertaken.

By considering these factors, the analysis provides valuable insights into the current state of agritourism in the surveyed countries, enabling policymakers and stakeholders to make informed decisions and implement strategies for the sustainable development of the sector.



STRENGTHS	WEAKNESS
<ul style="list-style-type: none"> <li>● Rich cultural heritage;</li> <li>● Contribution to rural development;</li> <li>● Year-round offering;</li> <li>● Strong connection between landscape quality and protection of natural resources;</li> <li>● Enhanced preservation of gastronomy and culinary traditions</li> </ul>	<ul style="list-style-type: none"> <li>● Limited data available at national and European levels;</li> <li>● Complexity of administrative procedures involved in running the activity;</li> <li>● Challenges in adapting facilities to ensure inclusivity of guests;</li> <li>● Inadequate infrastructure in rural areas, including internet connection, roads, and public transportation.</li> </ul>
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> <li>● Generate non-agricultural income;</li> <li>● Increasing demand for experiential tourism;</li> <li>● Significance in achieving key objectives of CAP 2023-2027, the "Green Deal" and "Farm to Fork" strategy;</li> <li>● Creation of new employment opportunities in rural areas.</li> </ul>	<ul style="list-style-type: none"> <li>● Burden of legislation and regulations;</li> <li>● Disconnect from agricultural activity;</li> <li>● Lack of institutional awareness regarding the sector;</li> <li>● Demographic changes in rural areas, specifically an aging population;</li> <li>● High investment costs associated with establishing agritourism ventures;</li> <li>● Insufficient training programs tailored to the needs of the sector.</li> </ul>



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