



# STAY

Still Tourism Around Yard

## NATIONAL REPORT OF AGROTOURISM IN PORTUGAL

April 2023





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### 1.



## 1. Origins of agrotourism in Portugal

### 1.1 An overview of agrotourism in Portugal

The Agrotourism concept in Portugal originated in the 80s under the designation of Residential Tourism, which was born with two essential objectives: increase the lodging supply's capacity and enhance the recovery of cultural, architectural and artistic heritage. The first attempt to legislate residential tourism occurred in 1978, initially covering only a few municipalities but extending to other areas as the number of houses registered increased. Only in 1986 did the legislation refer to the rural space relating it to tourism and established new forms of tourism in the rural space, such as Residential Tourism, Rural Tourism, and Agrotourism. In the following decades, new forms of tourism in rural areas were created, such as rural hotels, village tourism and country houses.<sup>1</sup>

In 2008, with the Decree-Law nº39/2008, a new legal regime for the installation, exploration, and operation of tourist accommodations, revoking the various diplomas that regulated this matter and bringing together, in a single decree-law the provisions common to all tourism accommodations, with a significant reduction in the existing typologies and sub-typologies and the introduction of a uniform system. Tourism accommodations are defined in one of the following typologies: a) hotels; b) holiday villages; c) tourist apartments; d) tourist resorts; e) residential tourism; **f) Tourism in rural areas (TRA) in which agrotourism is included**; g) camping and caravanning parks; h) nature tourism.<sup>2</sup>

The current definition of agrotourism in Portugal is the following: an establishment located on farms, considered to be a rural tourism development, 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, and may have no more than 15 accommodation units for guests.

*Note: In this report, information is based on data up to 2021 since most data for 2022 has yet to be published.*

The number of tourism establishments *in rural areas* (TRA) and *residential tourism* categories has increased steadily in the last decades (table 1).

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<sup>1</sup> [http://repositorio.ipv.pt/bitstream/20.500.11960/1155/1/Ana\\_Palma.pdf](http://repositorio.ipv.pt/bitstream/20.500.11960/1155/1/Ana_Palma.pdf)

<sup>2</sup> <https://dre.pt/dre/detalhe/decreto-lei/39-2008-247248>

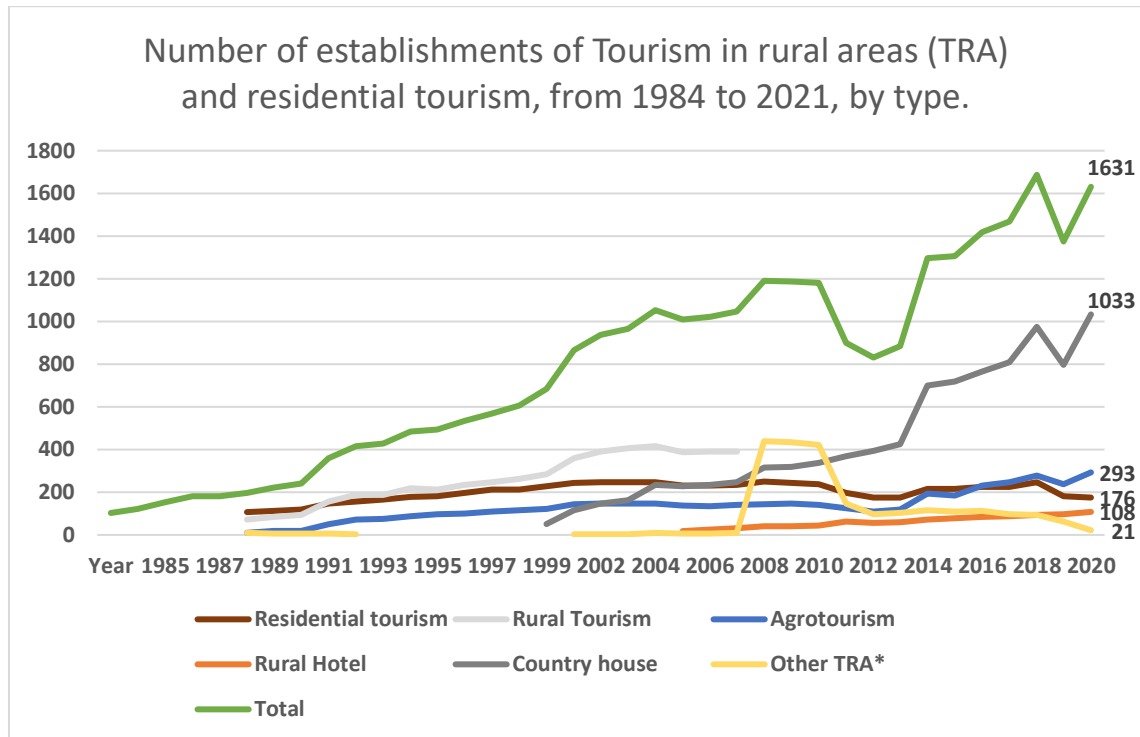


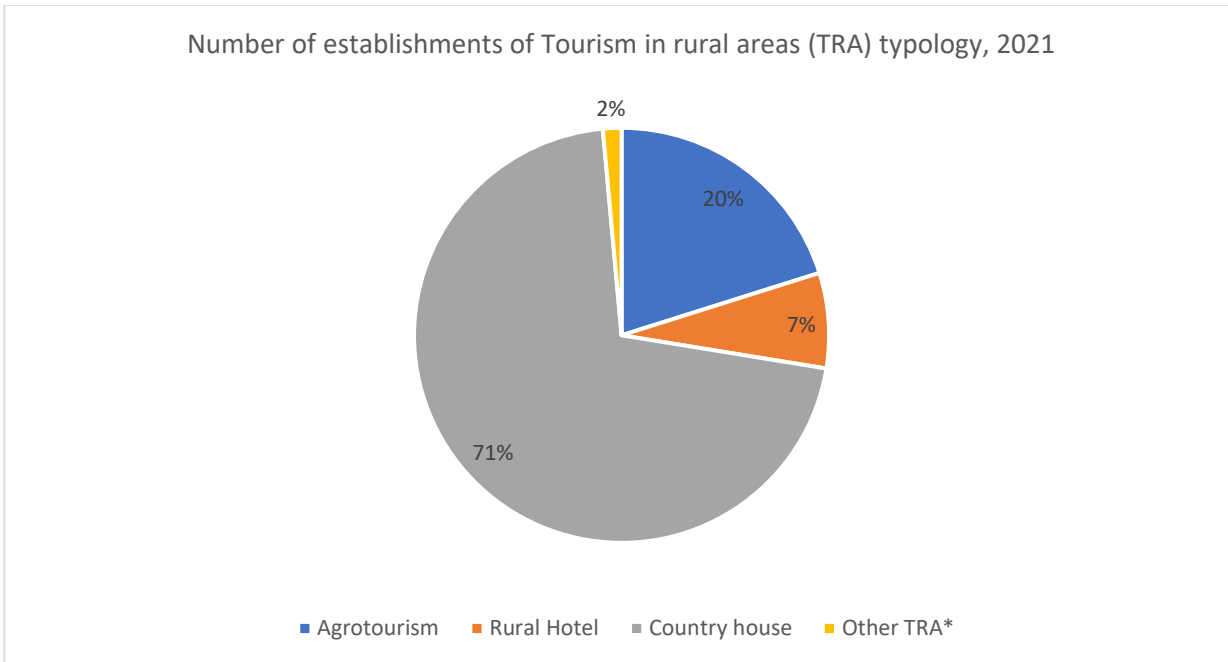
Figure 1 Number of Tourism establishments in rural areas (TRA) and residential tourism, from 1984 to 2021, by type. n.d. – No data; Other TRA\* include Rural Tourism (from 2008 onwards) and Village Tourism; Sources: Data compiled from INE (National Statistics Institute) tourism reports from 1984-2021; CENTER<sup>3</sup> (National central of Tourism in the rural areas) studies; national statistics report from the Tourism of Portugal, IP.<sup>4</sup>

In 2021, 1455 tourism in rural areas (TRA) establishments were active. Country houses (which incorporate most of the previously named rural tourism houses) were the most represented modality, with 1033 establishments (71% of the total establishments), followed by agrotourism with 293 units with a weight of 20.0% of the total offer in this accommodation segment.<sup>5</sup>

<sup>3</sup> <https://www.center.pt/PT/estudos.php?num=7&doc=Trabalhos%20/%20Estudos#>

<sup>4</sup> <https://travelbi.turismodeportugal.pt/>

<sup>5</sup> [https://www.ine.pt/xportal/xmain?xpid=INE&xpgid=ine\\_publicacoes&PUBLICACOESpub\\_boui=22122921&PUBLICACOESmodo=2](https://www.ine.pt/xportal/xmain?xpid=INE&xpgid=ine_publicacoes&PUBLICACOESpub_boui=22122921&PUBLICACOESmodo=2)



Source: Data extracted from INE- 2021 Tourism Statistics report.

## 1.2 The potential role of agrotourism in rural areas

Rural spaces and protected areas are increasingly considered tourist destinations worldwide for their natural and cultural values. Those spaces should be valued as areas for recreation, leisure, and connection to nature and place to maintain local cultures and traditions, which act as a differentiating factor.

Tourism in rural areas (TRA), and agrotourism in specific, has the potential to be of significant importance in the rural sector, where desertification continues to increase. At the economic level, it provides jobs, maintains and may improve services and local activities, and supports small businesses. It impacts the environment with the maintenance and conservation status of the rural and natural values and the maintenance of local customs and traditions.

Another topic that should be discussed is the potential of agrotourism for environmental education in schools. These sites can serve as outdoor classrooms where students can learn about agriculture, flora and fauna, customs and traditions, and much more. Like the other touristic accommodation typologies, agrotourism suffers from seasonality, with most of the activity condensed in the summer months. Thus, these environmental education activities could combat this seasonality and promote financial stability throughout the year. For all these reasons, agrotourism should be considered more closely to take advantage of all its potentialities and advantages.



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## 1.3 Funding and training for the agrotourism sector

In Portugal, agrotourism and TRA are susceptible to some lines of incentive support, namely:

- Support programs of the GAL - Local Action Groups;
- Regenerate Territories Line (Turismo de Portugal, IP);
- Offer Qualification Line - 2021 - Banking Protocol (Turismo de Portugal, IP + Financial Institutions) - for LDT- Low-Density Territories;

Regarding training, there is a constant supply promoted by regional development organisations and other certified companies, and the Tourism of Portugal provides an electronic platform with a list of the various training courses (virtual and on-site) directed to the entrepreneurs of the tourism sector. <sup>6</sup>

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<sup>6</sup> <https://academiadigital.turismodeportugal.pt/>



## 2. Regulation and legislation

According to the Decree Law no. 39/2008, Agrotourism is a part of the **TRA category (Tourism in rural areas)**, described as an establishment intended to provide accommodation services in rural areas, having for its operation an adequate set of facilities, structures, equipment and complementary services, to preserve and enhance the architectural, historical, natural and landscape heritage of the respective region.

Typologies that belong in the TRA category:

**1- agrotourism** - establishment located on farms, considered to be a rural tourism development, 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, and may have no more than 15 accommodation units for guests.

**2- country house** - establishment located in villages and rural areas, considered a rural tourism enterprise, which is intended to provide accommodation services and is integrated into the typical architecture of the region where it is located according to its style, construction materials and other characteristics, and may not have more than 15 accommodation units for guests.

**3- rural hotel** - hotel the dominant establishment located in a rural area that respects characteristics of the region where it is located, according to its architectural design and construction materials, and may be installed in new buildings that occupy the entire building or comprise a single architectural entity that respects the same characteristics.

According to the current legislation, the requirements of the agrotourism business are the following:

The properties must be located on farms that provide accommodation services to tourists and allow the guests to follow and get to know the agricultural activity or participation in the work carried out there, per the rules established by the person in charge. At least one sanitary facility must be for every two Accommodation units (AU) in agrotourism houses. Accommodation units can be installed outside the main building, in buildings adjacent or close to it, and that harmonise with it from the architectural point of view and the quality of facilities and equipment. These accommodation units can have up to three rooms. They must have, as a minimum, a private living room with or without a kitchen or kitchenette, a sanitary installation if it has one or two rooms, and two sanitary installations if it has three rooms. In agrotourism accommodations, the minimum area of single rooms is 7m<sup>2</sup> and 9m<sup>2</sup> for double rooms.





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Besides these, it is necessary to obey a set of other requirements common to all typologies belonging to the TRA category, for example:

Lighting system and hot and cold running water; Fire safety system and equipment under specific legislation; Climatization system; Fixed or mobile telephone; Fully equipped rooms, kitchen and bathrooms. Breakfast service is mandatory for all TRA. Upon prior request, lunches and dinners must also be available whenever no restaurant is within 5 km. The meals served must correspond to the Portuguese cuisine tradition and use, as far as possible, products from the region or the facility farm. <sup>7</sup>

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<sup>7</sup> <https://dre.pt/dre/detalhe/portaria/937-2008-453513>



### 3. Relevant data regarding agrotourism

#### 3.1 Number of agrotourism accommodation

From the complete tourist accommodation offered in Portugal, namely hotels, tourism in rural areas and local accommodation (with more than ten beds), camping sites, vacation campsites and youth hostels, 6.571 establishments were in operation in 2021. With 293 units, Agrotourism represents 4.4% of Portugal's complete tourist accommodation offer.

Tourism in Rural Areas (TRA) establishments made available around 24.5 thousand beds in 2021, with country houses concentrating 56.9% of the capacity of this accommodation segment. This was followed by rural hotels (21%) and agrotourism units (20.4%). Despite the TRA establishments segment representing around 22% of the total tourist accommodation offer, they only amount to 6% of the total beds offered; as such, agrotourism represents around 1.22% of the total offer.

The regions with the highest supply were the North (38.4% of the establishments and 34.4% of the beds), the Centre (24.1% of the establishments and 22.8% of the bed places offered) and Alentejo (21.1% and 24.1%, respectively). These regions mainly produce agricultural products such as olive oil and wine.

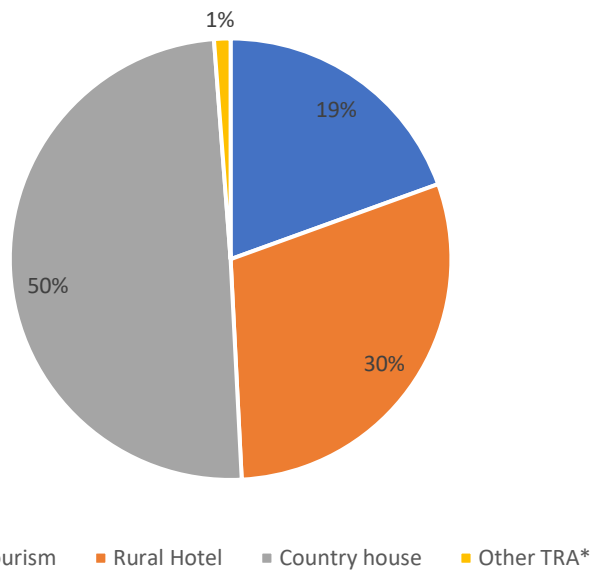
#### 3.2 Demand

In 2021, tourist accommodation establishments recorded 14.5 million guests, which provided 37.3 million overnight stays, rural and residential tourism establishments recorded 846.1 thousand guests (+41.9% than 2020) and provided 1.8 million overnight stays (+42.1%), which translates into a TRA establishment weighting 5.8% of the total guests and 4.8% of the overall stays recorded in 2021. Compared to 2019 (pre-covid 19 pandemic), there were decreases of 10.8% in guests and 6.4% in overnight stays in the TRA sector. The regions with the highest demand for this specific segment were the North (30.0% of overnight stays), the Alentejo (26.6%) and the Centre (20.6%).

In the TRA accommodation segment, the country houses were the type with the highest number of overnight stays (50% of the total), followed by rural hotels (30%) and agrotourism (19%).

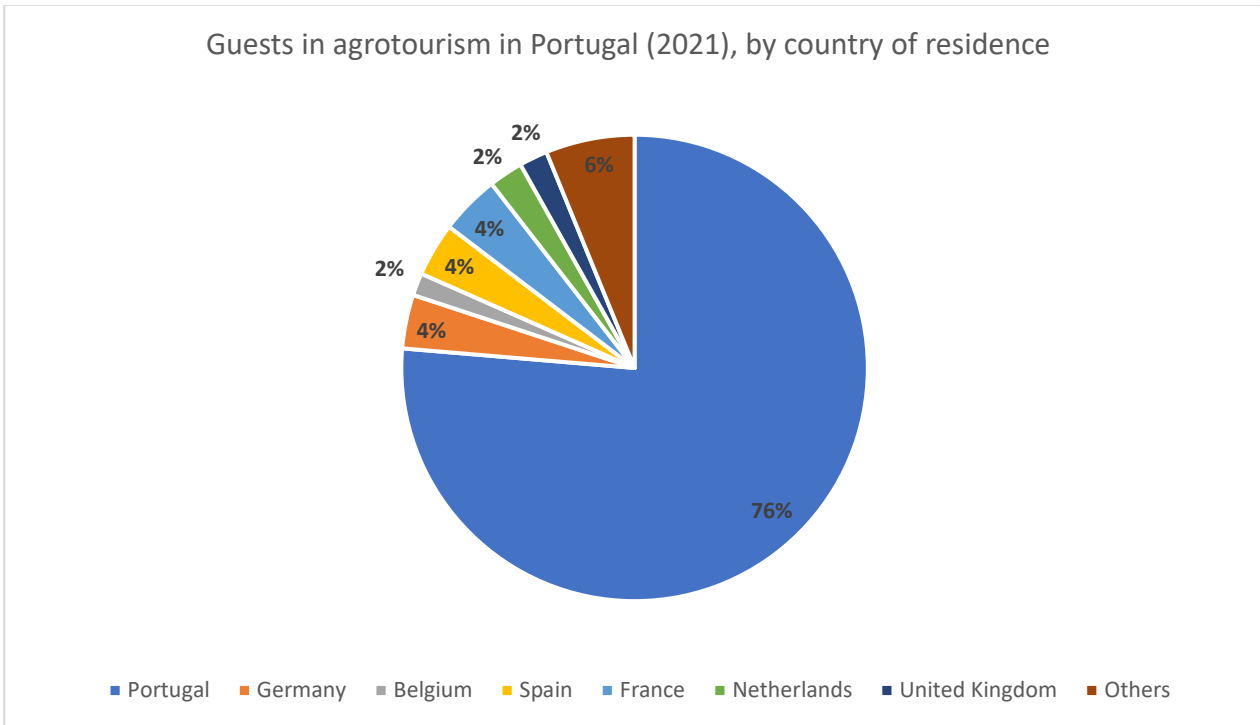


### Overnight stays in Tourism in rural areas (TRA), by modality, 2021



Source: Survey on the Stay of Guests in Hotels and Other Accommodation (IPHH), adapted from INE- 2019, 2020 and 2021 Tourism Statistics reports.

The average stay was 2,17 nights in 2021, and the regions with the highest stays were the Autonomous Region of Madeira (3.25 nights), Algarve (3.16 nights) and Azores (3.11 nights). The overall bed occupancy rate stood at 24.7% (+3.6 p.p. versus 2020), with the highest occupancy rates occurring in Madeira (34.5%) and the Algarve (33.0%). Rural hotels recorded the highest rate (33.4%).



Source: INE - Survey on the Stay of Guests in Hotels and Other Accommodation

Most guests in agrotourism accommodations are national residents (~76%). This contrasts with the touristic panorama, where residents account for around 52%.

### 3.3 Economic data

In tourist accommodation establishments, the total revenues amounted to 2.3 billion euros (+61.2% than 2020 and -45.8% than 2019), and the room rate to 1.8 billion euros (+62.8% than 2020 and -45.7% than 2019). The average revenue per available room (RevPAR) was 32.6 € in 2021 (+43.9% compared to 2020 and -34.1% in 2019), and the average daily rate (ADR) was 88.2 € (+14.2% to 2020 and -1.1% compared to 2019).

In the TRA + residential tourism segment, the total income reached 127.6 million euros (+53.4% in 2020 and +7,5% compared to 2019); it represents 5.5% of the total revenues of the tourist accommodation establishments in 2021. This segment's average revenue per available room (RevPAR) was 30.0 euros (+22.9% in 2020 and +16.3% in 2019). The average revenue per occupied room (ADR) stood at 104.9 euros (+3.1% in 2020 and +11.1% in 2019). This data reveals that the covid 19 pandemic less impacted tourism in the TRA category than other tourism establishments; this was expected as people avoided mass tourism and preferred less populated and less urbanised locations for their vacations.



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Regarding employment and the incomes in the agrotourism sector, as happens with many other relevant data, there needs to be more information available. The only data available for the total number of employees in all the accommodation activities, registering 66.400 employees and the gross monthly income per worker was 1.115€ in 2021. <sup>8</sup>

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<sup>8</sup>[https://www.ine.pt/ngt\\_server/attachfileu.jsp?look\\_parentBoui=567573797&att\\_display=n&att\\_download=y](https://www.ine.pt/ngt_server/attachfileu.jsp?look_parentBoui=567573797&att_display=n&att_download=y)



## 4. Swot analysis and Final remarks

Throughout the development of this report and the interviews with agrotourism entrepreneurs, it was noticed that the current legislation, despite having a well-defined set of rules for starting and running an agrotourism business, needs a differentiating factor for the Agrotourism vs Country house accommodation. There is no benefit in being designated *Agrotourism* or *Country House*, and we could find examples of *country houses* with a more robust agriculture component/activity than many *agrotourism* accommodations themselves.

According to the interviews conducted with agrotourism entrepreneurs, when asked about the guests' interest in accompanying the agricultural activities, the answer was that a tiny percentage were interested in helping in the activities. However, most guests like to see the farm work and are interested in the activities and how things are done. Most guests seek leisure/rest and gastronomic experiences when booking an agrotourism accommodation. This happens because many agrotourism lodgings function merely as an accommodation and do not have a diversified and differentiated offer, encouraging guests to participate in the activities. For this reason, it is essential to create networks between agrotourism entrepreneurs, farmers and local stakeholders, improving rural territories' cultural and natural heritage valorisation.

Despite the well-detailed yearly Statistics Reports from INE and The Tourism of Portugal, IP, regarding the general touristic activity in Portugal, there is still a lack of information specific for the TRA category in general and agrotourism in particular, that data should be analysed and made publicly available, as it is essential to understand the status and weight of TRA in the current national tourism scope.

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>- Rich cultural heritage</li> <li>- Good weather conditions</li> <li>- Good gastronomy and culinary traditions;</li> <li>- Despite being a small country, it offers a vast diversity of landscapes in rural areas: Mountains,</li> </ul>	<ul style="list-style-type: none"> <li>- Complexity of administrative procedures.</li> <li>- Poor Internet connection in many rural areas</li> <li>- Poor public transportation systems in rural areas</li> <li>- Complexity of administrative procedures.</li> <li>- Some Agrotourism don't offer any agriculture as</li> </ul>

<p>plains and proximity to the coast</p> <ul style="list-style-type: none"> <li>- One of the most peaceful countries in the world. (6<sup>th</sup> in the Global Peace Index 2022)</li> <li>- Exceptional natural environment: A National Park and many protected areas</li> <li>- Non-seasonal offer.</li> <li>- Relaxed, non-overcrowded tourism.</li> <li>- More informal and familiar hospitality;</li> </ul>	<p>an activity for the tourists, functioning merely as accommodation in a rural area.</p> <ul style="list-style-type: none"> <li>- Few Agrotourism accommodations have facilities adapted for guests with impaired mobility (accessibility).</li> </ul>
<b>Opportunities</b>	<b>Threats</b>
<ul style="list-style-type: none"> <li>- Provide non-agricultural income;</li> <li>- Compatibility with new demand trends (technological detox retreats, wellness, nature activity, digital nomads, etc.).</li> </ul> <p>Improved accessibility to rural areas.</p> <ul style="list-style-type: none"> <li>- Improve the valorisation of the cultural and natural heritage of rural territories and contribute to rural development</li> <li>- Rural landscape preservation</li> <li>- Reduce the human desertification happening in the countryside</li> </ul>	<ul style="list-style-type: none"> <li>- Price increases - inflation</li> <li>- Economic and political uncertainty.</li> <li>- Rural depopulation/desertification of the countryside</li> <li>- Aging population</li> <li>- Increased competition also at the international level</li> <li>- Loss of the link with agricultural activity</li> <li>- Climate change;</li> </ul>

SWOT analysis on agrotourism in Portugal

Source: Own elaboration (2023)