



STAY

Still Tourism Around Yard

NATIONAL REPORT OF AGROTOURISM IN SPAIN

April 2023



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Introduction

Tourism is one of the driving forces of the Spanish economy. In 2022, the national balance of payments showed a positive balance for tourism of €48 902M and the number of Social Security affiliates in tourism activities exceeded 2.5 million. That year, Spain was the third country in the world in terms of international tourist arrivals, with more than 71 million. In addition, Spaniards made 155 million trips within the national territory. As for rural tourism, 4.3 million travellers and 11.9 million overnight stays were recorded in 16 420 establishments, with an occupancy rate of 20 % (Turespaña, 2022).¹

The agri-food sector is another driving force of the national economy: it represents 5.8 % of GDP (11 % if we include trade) and 17 % of total exported goods, with a trade surplus of around 1 % of GDP (COAG, 2022).² 47.88 % of Spain's land area is devoted to agriculture. According to Eurostat, in 2019 Spain had the highest production among EU Member States for fresh vegetables (15.4M Tn, 25.3 % of the EU-27), citrus fruits (6M Tn) and olives (6M Tn). Permanent crops (22.7M Tn, 32.1 % of the EU-27) and cereals, including rice (19.9M Tn, 6.7 % of the EU-27) are also worth mentioning. In fact, one of the most characteristic features of Spanish agricultural production is its high degree of crop diversity, with some of them showing great social roots and contributing a large volume of labour, as in the case of olive groves, vegetables, vineyards or fruit trees. According to Eurostat, in 2016 in Spain there were 945 020 agricultural holdings (9.2 % of the EU-27), with a total utilised agricultural area (UAA) of 23.2M ha (14.8 % of the EU-27) and there were 945 020 agricultural holdings (9.2 % of the EU-27). Furthermore, the contribution of agriculture to GDP was 2.2 % in 2019 and the gross value added (at basic prices) was 28 066M € (15.5 % of the EU-27). According to the National Institute of Statistics, the labour force in 2022 in the agricultural sector was 886 100 persons (excluding fisheries and aquaculture).

Therefore, agrotourism,³ understood as that modality 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), together with the owners of the farm, is an activity with an interesting potential in Spain. Thus, it is basically tourism practised by people who have grown up in the cities and are not familiar with farm work but are attracted by it. Learning to milk a goat or a cow, feeding livestock, shearing

¹ <https://www.tourspain.es/es-es/ConocimientoTuristico/Paginas/FichaResumen.aspx>

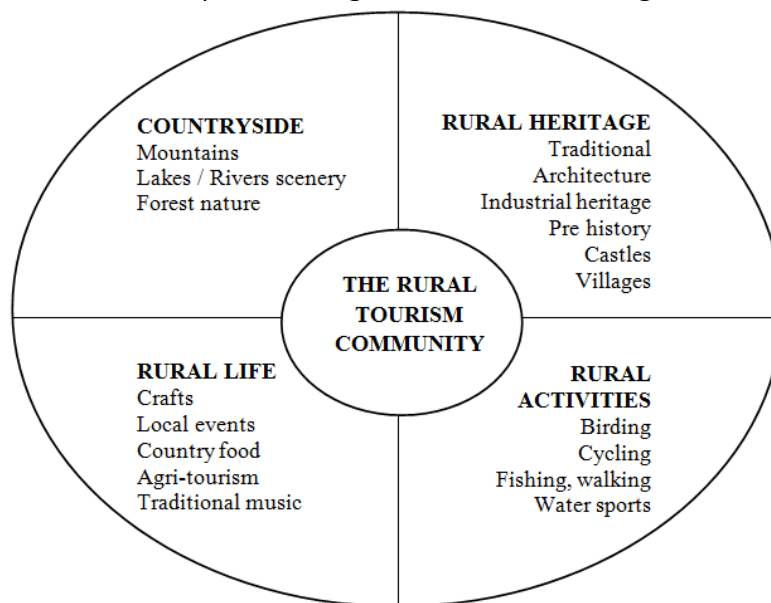
² https://www.coagjaen.es/wp-content/uploads/Informe_Impactos_Cambio_Climatico_en_la_Agricultura.pdf_compressed.pdf

³ The purpose of this report is not to define the concepts of rurality or rural tourism, which have been widely described by numerous authors, including national and regional legislation. Nor is it to opt for one or other definition, since the diversity of the territory, of its maturity in tourism development and of the Spanish legal system in terms of rural tourism provides different aspects that make it difficult to generalise. We start, therefore, from the premise of rural tourism understood as that travel (which involves an overnight stay) to a territory linked to the countryside (as opposed to the urban environment), with an economy mainly based on primary activities, which generally only benefits from basic services, and with a relevant role for traditions and ways of life linked to nature and agriculture and livestock activities. The concept is described more in depth in the glossary included in the Summary Report that will be drafted in the framework of the STAY project.

sheep, participating in tilling the land, harvesting fruit and vegetables, making cheese or jam, etc., are some experiences that agrotourists can live to escape from urban life.

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 (it is based on the knowledge of the work and life in the countryside) and a social component (tourists share knowledge and experiences with the local people and take part in the culture and traditions of the territory they are visiting).

The rural tourism concept according to World Tourism Organization (UNWTO)



Source: Nulty, P. M. (2004). Keynote Presentation: Establishing the Principles for Sustainable Rural Tourism, Rural Tourism in Europe: Experiences. Development and Perspectives, WTO, 2

Somehow, after half a century in which tourism has evolved from being a residual practice available only to a privileged few to a global mass phenomenon, an economic driving force for many territories, we find ourselves in a social and economic context that represents a beautiful opportunity for an agrotourism 2.0 that maintains many of the motivations and practices of the pioneering tourists, updated with current needs and trends. It is not in vain that agriculture, livestock farming and tourism have been, are and will be fundamental activities in our economy and our society. Moreover, the most recent trends in rural tourism are fully compatible with the most authentic agrotourism.



Spain treasures many resources for agrotourism

This report briefly describes the birth and evolution of agrotourism in Spain, pointing out what its future may be in the medium term.



1. Origins of agrotourism in Spain

1.1 Spanish agrotourism

We can attribute the birth of agrotourism in Spain to the programme “Vacaciones en Casas de Labranza”, promoted in 1967 through an agreement between the Agrarian Extension Agency (Ministry of Agriculture) and the Secretary of State for Tourism (Ministry of Information and Tourism). The objectives of the programme were revitalising declining rural areas, promoting the development of mountain areas and nature conservation, reforestation, agriculture, hunting and fishing. Farmers were given grants to adapt their houses to accommodate tourists: at a minimum, they had to offer a room with two beds, a bathroom and a separate toilet. Farmers welcomed guests and showed their way of life, even allowing them to participate in daily activities. These were holidays at reasonable prices, in the middle of nature and in a family atmosphere, with a particular component of social tourism.⁴ The profile of those first agrotourists was that of middle-class families with children from urban origins, mostly Spaniards. The average accommodation occupancy was 90.7 days/year and 2.16 people/accommodation (Carazo, 1982 and Guarnido and Vílchez, 1997). Between 1969 and 1986, an accommodation guide, *Guía de Vacaciones en Casas de Labranza*, was published.

The programme “Vacaciones en Casas de Labranza” (Holidays in farmhouses)

Year	Provinces	Houses	Rooms	Beds
1967	2	384	827	1 152
1969	22	2 186	5 456	7 515
1970	33	4 414	9 568	14 231
1971	41	4 957	11 794	16 932
1973	41	7 075	16 155	25 674
1975	41	8 134	19 872	30 792
1977	42	8 312	19 631	32 038
1980	41	2 093	5 199	9 628
1985-86	42	1 096	4 674	8 852

Source: Own elaboration based on Carazo (1982) and Guarnido and Vílchez (1997)⁵

It was in force until 1986, and lack of funding was the main problem from the beginning. As seen above, the numbers were increasing during the seventies, but in the eighties, the programme declined until it was discontinued.

At that time, the context in our country was the take-off of tourist activity. Law 197/1963 on Centres and Areas of National Tourist Interest promoted the creation of tourist resorts on the coast. Within a few years Spain had become a leading destination for sun and beach tourism, which led to the mass occupation of the coasts and the development of vacation houses and hotel complexes.

⁴ Rural women have been the protagonists of this multifunctional agriculture, both economically and personally, because of the greater visibility of their work and their role in the family.

⁵ There are divergences in the figures provided by both sources for 1969, 1971 and 1977.

Regarding inland destinations, the initial promotion of agrotourism with the programme "Vacaciones en Casas de Labranza" was followed in 1984 by the initiative of the General Secretariat for Tourism, which financed three projects aimed at the implementation of Projects for the Joint Offer of Accommodation and Tourist Animation. The best known is the one in the Asturian municipality of Taramundi, where the old 18th century rectory was restored and converted into the Hotel La Rectoral de Taramundi (in 1986), considered the first rural hotel in Spain.

Shortly before that, the first autonomous regulation on rural tourism had been approved: Decree 365/1983 in Cataluña. The decree introduced the figure of the "residència-casa de pagès" (farmhouse-residence). However, it did not distinguish between agrotourism and rural tourism since, although the owner or tenant had to work preferably in the agricultural sector, this was not an essential condition; nor did it differentiate between houses that were fully rented and those that offered accommodation by rooms (Cànoves *et al.*, 2006).

In the spring of 1990, the first agrotourism accommodation in País Vasco started up: "Txopebenta", in Gautegiz Arteaga (Vizcaya). That July, eleven businesses were already running. Moreover, in October 1991, Nezakalturismoa-Landaturismoa, the first agrotourism association in Spain, was created. The first rural house opened on 1998/02/19: "Arboliz", in Ibarangelu (Vizcaya). Since then, Nekazalturismoa-Landaturismoa (later renamed Asociación de Alojamientos Rurales de Euskadi-Nekatur) has come to encompass both agrotourisms and rural houses (Nekatur, 2023).

It was during the 80s that agrotourism (already "converted" into rural tourism) evolved from a sporadic, unusual, incipient, non-professional phenomenon to a more consolidated and regulated activity. The causes were diverse: the crisis in agriculture, incipient exhaustion of the sun and beach model,⁶ the emergence of new forms of tourism (inland, cultural) and a certain loss of the rural roots of a good part of the inhabitants of the large Spanish cities (Cànoves and Villarino, 2000). The context, the great emigration since the mid-sixties from rural to urban areas (the so-called rural exodus,⁷ which marked the beginning of the "empty Spain"), accelerated by two reasons: the crisis in the agricultural regions and the demand for labour in industrial areas. It also coincided with the moment in which the autonomous communities acquired great regulatory independence when they received the transfer of a multitude of legal competences within the framework of the decentralisation process and the development of the statutes of autonomy.

During the 1990s, society's new consumer habits (greater importance of leisure, a more competitive market, more demanding consumers, more fragmented holiday periods, greater attraction for nature) led to a new boost for rural tourism. Aspects such as the quality of accommodation and

⁶ More theoretical than real, as the tourist occupancy figures for the Spanish coastline still corroborate.

⁷ Cànoves *et al.* (2005) point out that "this process has been much later in our country than in the rest of Europe. Thus, very recently, rural areas were associated with 'poor areas' and not with idyllic places and unspoilt and somewhat peaceful landscapes. Therefore, it is only two decades ago that the new generation of 'urbanites' was born and raised in big cities, and therefore, they are starting to appreciate the countryside again but with city-dwelling values".

services, the maintenance of competitive prices and the supply of complementary activities (adventure sports, gastronomy, nature, culture, spas, etc.) are becoming increasingly important. These are times of "package tourism" (Cànoves and Villarino, 2000), institutional support and European funds.

In southern Europe, agrotourism has evolved from simple accommodation structures to more professionalised and diversified structures in order to attract a more demanding and heterogeneous customer base over the last three decades. There is an increase in the number of farmers offering activities related to agricultural work, the processing and sale of products and other leisure activities; and others are opting to expand their accommodation offer (Cors, 2020).



Ecotourism experienced a big increase from the 90s onwards

1.2 Funding and opportunities for agrotourism

The 1957 Treaty of Rome establishing the European Economic Community set out several economic and social measures, including the establishment of a common agricultural policy (CAP) with the following objectives:

- Social. To guarantee a fair standard of living for the agricultural community and to ensure consumer supplies at low prices.
- Economic. To increase agricultural production and stabilise markets.

The Community policies for Rural Development integrated in the CAP have their fundamental tool in the application of Community regulations and in the use of its different financing Funds: the European Regional Development Fund (ERDF), the European Social Fund (ESF) and the European Agricultural Guidance and Guarantee Fund (EAGGF) in its two sections, Guidance (supporting the modernisation and rationalisation of farms) and Guarantee (financing interventions aimed at the regulation of agricultural markets).

Two types of agriculture were considered at the time: one competitive and the other marginal (which included mountain farming). The former was to be responsible for feeding Europe, while the areas covered by marginal agriculture risked depopulation. The aim was to maintain the small farms in these disadvantaged areas, since, in addition to producing food, they ensured the preservation of the landscape and the natural heritage. Thus, the EEC did not renounce the family farming model, but the solution was to support non-agricultural investments, and here agrotourism played a key role (Cors, 2020).

Since then, the European Funds have contributed to the development of agricultural and livestock facilities to make them compatible with the hosting of agrotourists.

The LEADER I programmes (1991-1994)⁸ began a new conception of rural development policy based on a territorial, integrated and participatory approach, emphasising rural tourism by creating new tourism products. 52 Local Action Groups in Spain were formed, corresponding to 53 programmes. LEADER II (1994-1999)⁹ was more oriented to the promotion of innovative activities carried out by local agents (with a regional approach) and to the support of rural development (generating rural income and employment). Over time, there was a shift from a more pure agrotourism (supplementing agricultural income) to rural tourism linked to other objectives (Guerrero *et al.*, 2012). LEADER+ (2000-2006) promoted original strategies for sustainable and quality development. Its main objective was to help rural actors to reflect on the potential of their territory in a longer-term perspective. The LEADER Axis (2007-2013) served to continue and deepen the experiences of its predecessors in the new phase. The Programme for Economic Development and Diversification

⁸ LEADER (acronym from the French "Liaisons entre activités de Développement de L'Economie Rural", i.e. "Relations among Rural Economy Development Activities") is the name given to the successive EU rural development initiatives.

⁹ 45 % of the national surface area and 12.22 % of the Spanish population could benefit from LEADER II, considering both Objective 1 and Objective 5b areas.

of Rural Areas (PRODER) was also developed, a set of rural development programmes that applied endogenous development measures and were implemented only in Spain, as a complement to LEADER.¹⁰

Cànoves *et al.* (2005) pointed out some common objectives in the different stages of the evolutionary process from initial agrotourism to more modern rural tourism:¹¹

- A first objective was the recovery of traditional housing for tourist uses to recover and avoid the deterioration of the architectural heritage.
- A second objective was to help revitalise an industry complementary to farming and to provide income supplements to agriculture. This was an action common to all the autonomous communities, which has been distorted over time and with the revision of regional regulations, where, in general, the obligatory nature of farming has lost relevance.
- A third objective was to slow down rural depopulation through job creation.
- A fourth objective was the development of nature tourism, the revaluation and awareness of the environmental heritage of rural areas and, in short, a cultural and social revaluation of life in rural areas.

The European Funds continue to finance the implementation of agrotourism businesses in Spain within the LEADER 2023-2027 aid articulated through the Local Action Groups.

¹⁰ PRODER (1996-1999) and PRODER 2 (2000-2006).

¹¹ Over the years, the essence of agrotourism has become blurred and the link between agricultural activity and accommodation has lost relevance, both in regional regulations and in the promotion and marketing of this type of accommodation. In many cases there is still a strong link between the accommodation and the tourist experience and the agricultural world, but this is not perceived by the market. Sometimes it is not even covered by the legal framework in force in their autonomous community. To put it colloquially: many rural tourism businesses are agrotourisms, but "they neither know it nor say it". Maybe they don't even care: they are what they are, what they have always been, what they want to be, what they think they should be.

2. Legislation and regulations

2.1 Agrotourism in state-level regulations

Article 148.1.18 of the Spanish Constitution transfers to the autonomous communities the exclusive competence for "the promotion and organisation of tourism in their territorial area". Therefore, in Spain there is not one regulatory framework for agrotourism but 19, one for each autonomous community and the two autonomous cities (Ceuta and Melilla).

However, the Nations's government (if interested in) could have supported agrotourism by drafting a national plan and providing the autonomous communities with some additional funding, as it has done, for example, in the case of the programme of Tourism Sustainability Plans in Destinations, financed with European Next Generation funds.¹²

2.2. Agrotourism in regional regulations

The development of regional **regulations** on agrotourism and rural tourism has been uneven. Nowadays, all Spanish autonomous communities have regulations on rural tourism (with the status of law or lower, which develops them), but only ten¹³ explicitly reference agrotourism. The treatment is different depending on the region: while in some autonomous communities agrotourism is identified with a specific modality or type of rural accommodation, in others it is considered a transversal modality to all rural tourism establishments.

Cataluña was the first autonomous community to legislate on the topic (1983), followed by País Vasco (1988). Both regulated agrotourism by decree and identified it as a rural accommodation service provided by farmers, as an income supplement, and integrated into a farm. At that time, only agrotourism was considered. However, from the 1990s onwards, the concept evolved into a more generic rural tourism in which the link between agricultural productive activity and the hosting of guests became blurred and agrotourism lost its legal presence. The number of designations and types of accommodation increased considerably (there are currently around 50 different types throughout Spain), which differ from one community to another due to a lack of common criteria and which hinder market unity (Guerrero *et al.*, 2012).

¹² <https://boe.es/boe/dias/2022/04/15/pdfs/BOE-A-2022-6258.pdf>

¹³ Guerrero *et al.* (2012) attribute the explicit absence of agrotourism in the legal texts of the remaining regions to several causes: a) the low level of development and implementation of agrotourism in these territories; b) the meaning of the concept itself, which goes beyond what is strictly able to be regulated; and c) the decision of the responsible bodies not to differentiate agrotourism from the rest of rural tourism establishments, since the criteria for classifying accommodation are different (accommodation regime, services provided, location and characteristics of the rural house, etc.) These territories are preferably located in the centre of the peninsula: Castilla y León, Cantabria, La Rioja, Comunidad de Madrid, Extremadura, and Región de Murcia.

Regulatory framework for agrotourism in the Spanish Autonomous Communities (I)

Autonomous Community	Rural tourism regulation	Agrotourism mentions	Agrotourism is...
Andalucía	Decree 20/2002	Annex I	accommodation on a working farm, in which, as a complementary activity, tourists can participate in traditional farm work; this is an (optional) speciality for rural accommodation establishments.
Aragón	Decree 204/2018	Art. 2, 5.4	a mention may be granted to rural houses linked to registered agricultural or livestock holdings.
Canarias	Decree 142/2010	No	
Cantabria	Decree 83/2010	No	
Castilla y León	Decree 75/2013	No ¹⁴	
Castilla-La Mancha	Decree 88/2018	Art. 2, 3	a modality of a tourist accommodation establishment in the rural environment [...] in which the owner, usufructuary or legal lessee runs an agricultural, livestock or forestry holding and, as a complementary activity, provides a room service, with or without the provision of food service.
Cataluña	Decree 75/2020	Art. 213-33, 213-37	an establishment in which the owner, a professional farmer, earns income from agricultural, livestock or forestry activities [...], and where users can learn about the tasks and activities of the agricultural operation to which they are linked.
Comunidad de Madrid	Decree 117/2005	No	
Comunidad Foral de Navarra	Foral Decree 44/2014 ¹⁵	Art. 2	the provision, for a fee, of tourist activities related to agri-food companies, both for the enjoyment and education of the public and the promotion of the products of such companies.

Source: Own elaboration (2023)

¹⁴ But Decree 298/1993 of 2 December 1993 from Junta de Castilla y León on the organisation of rural tourism accommodation (repealed) did provide for agrotourism (Article 8).

¹⁵ This is the only specific decree on agrotourism in all the Spanish autonomous communities.

Regulatory framework for agrotourism in the Spanish Autonomous Communities (II)

Autonomous Community	Rural tourism regulation	Agrotourism mentions	Agrotourism is...
Comunidad Valenciana	Decree 10/2021	Art. 67.1	a speciality of rural houses for those establishments integrated in agricultural holdings, made up of a unit or group of units integrated and used jointly as a dwelling and to satisfy the needs of an agricultural holding.
Galicia	Law 7/2011	Art. 68	a modality of rural tourism accommodation for those establishments integrated into agricultural, livestock or forestry holdings which, together with accommodation, offer services generated by the holding itself, allowing the participation of tourist users in the tasks related to agricultural, livestock or forestry activities.
Galicia	Decree 191/2004	Art. 2.1, 3	those developed in farmhouses (that is, houses located in the rural environment and with rooms dedicated to the accommodation of guests), where agricultural and livestock activities are carried out in which the guests can participate.
Islas Baleares	Law 3/2019 ¹⁶	Art. 96	<p><i>agroestancia</i> (agro-stay): overnight stay and lunch service, with a maximum of six beds per holding, as long as they are in a dwelling and the farmer lives on the holding.</p> <p><i>agroocio</i> (agro-leisure): activities based in the rural world and included in active tourism, which are carried out on a farm, such as hiking, trekking, climbing, speleology, cycling routes and any other similar activity.</p> <p><i>agrocultura</i> (agro-culture): complementary activities related to the knowledge, dissemination or enjoyment of the culture and ethnological heritage of the agrarian world, related to farming production and its transformation, such as activities related to vines and wine (viniculture), olive trees and oil (olive growing), pork and its derivatives, milk and its derivatives, hunting, horses, tasting and tasting of products from the holding or the group of holders of preferential holdings [...]. Agricultural establishments include wine cellars, wine museums and oil mills on preferential agricultural holdings.</p>

Source: Own elaboration (2023)

¹⁶ It is an agrarian law, not a tourism law.

Regulatory framework for agrotourism in the Spanish Autonomous Communities (III)

Autonomous Community	Rural tourism regulation	Agrotourism mentions	Agrotourism is...
Islas Baleares	Decree 20/2015	Art. 103	establishments providing tourist accommodation services located in constructions built before January 1 st 1960, located on rural land and on a farm or farms with a minimum surface area of 21 000 m ² and which constitute an agricultural, livestock or forestry holding registered in the General Register of Agricultural Holdings of the Balearic Islands for the entire period during which the tourist operation is carried out.
La Rioja	Decree 10/2017	No	
País Vasco	Decree 199/2013	Art. 2, 3.1, 4	the provision of accommodation services, with or without meals and other complementary services, for a fee, in establishments located in the rural environment under regulated conditions [...] Agrotourism establishments must be integrated into agricultural holdings, respond to traditional mountain or rural architecture and be located in rural areas [...] An essential requirement for the exercise of the agrotourism activity is that it is carried out by farmers who have this status per the current regulation. The status of farmer must be maintained permanently and indefinitely for the activity to be classified as agrotourism.
Principado de Asturias	Decree 143/2002	Art. 4	a speciality for any modality of rural tourism accommodation in which the establishments are integrated in agricultural, livestock or forestry holdings which, together with the accommodation, offer services generated by the holding itself.
Región de Murcia	Decree 76/2005	No	

Source: Own elaboration (2023)

If we compare the definitions of agrotourism included in the standards referred to in the table above, the following conclusions can be drawn:

- All regions except Comunidad Foral de Navarra identify the agrotourism activity as an income complement for agricultural or livestock farms.
- Agrotourism is considered a specific type of rural tourist accommodation in Castilla-La Mancha, Cataluña, Galicia, Islas Baleares and País Vasco.
- Agrotourism is considered a speciality of rural tourist accommodation in Andalusia, Aragón, Comunidad Valenciana and Principado de Asturias.

- Comunidad Foral de Navarra and Islas Baleares are the only communities not considering agrotourism exclusively as an accommodation service, but including also other recreational activities (even without overnight stay).
- Comunidad Foral de Navarra is the only region that has approved a decree exclusively dedicated to agrotourism, instead of some articles in a regulation on rural tourism.
- Islas Baleares regulates the activity from two different authorities, with an agrarian law and a tourism decree. It is a unique case in the Spanish legal system.
- Some regions have modified their approach to the regulation of agrotourism over time. This is the case of the País Vasco and Cataluña (which initially considered only agrotourism, later becoming a category within rural tourism) and Extremadura and Castilla y León (which first regulated agrotourism but those regulations were repealed, and current ones do not include that subject anymore).

Another interesting aspect to highlight regarding regulation is that of **taxation**. In this case, the state does have legal powers (Article 149.1.14 of the Spanish Constitution). Each economic activity carried out by the same natural person or legal entity is submitted to the corresponding legal tax framework. In other words, the agrotourism activity is considered as the simultaneous carrying out of a farming activity and a tourism activity and, therefore, is taxed independently for each one. This means double accounting for agrotourism entrepreneurs and, in the end, a greater complexity for administrative procedures.



Islas Baleares regulates agrotourism both with tourism and agrarian rules

3. Relevant data regarding agrotourism

3.1. Supply description

Rural tourism has experienced a great growth in Spain over the last three decades, both in terms of supply and demand. It raised from 1 074 rural houses in 1994 (Cànoves *et. al.*, 2006) to 14 075 (monthly average; *Encuesta de ocupación en alojamientos turísticos extrahoteleros-EOAT*, Instituto Nacional de Estadística, 2022).

What percentage of these houses are actually agrotourisms? It is impossible to determine, because no official data is gathered in Spain. As an approximation, indirect sources can be used, such as the data on rural tourism periodically collected by the National Institute of Statistics¹⁷ and by two private platforms (Escapada Rural¹⁸ and Clubrural¹⁹). However, these sources do not discriminate between agrotourisms and other rural accommodations.

Another indirect source at the national level is the Agrarian Census. In its 2020 edition, the census lists 3 196 agricultural holdings including "Tourism, accommodation and other recreational activities", which is only 0.4 % of the total number of holdings (INE, 2020).

In *Identificación, caracterización y análisis del potencial de las tipologías de interés especial de turismo de interior*, Pulido (2021) argues that "in addition to accommodation and catering, the agrotourism offer usually includes different types of activities, among which everything related to learning how to farm (feeding the farm animals, milking the cows, collecting the hens' eggs, pony, horse or donkey rides, shearing the sheep, or other activities related to caring for the garden, such as tilling the land, growing vegetables, fruit and vegetables, or harvesting them)" [...] "It is also widespread to find offers that propose an immersion of the tourist in activities related to the elaboration of food, such as jams, curds, yogurts, cheese, honey, olive oil, etc., as well as natural ornaments, aromatic oils, pottery, ceramics, etc. Likewise, workshops on traditional gastronomy are developed, as well as courses on awareness and familiarisation with nature, horse riding, animal sightings in the wild, etc." [...] "The agrotourism supply is usually completed with the attendance

¹⁷www.ine.es/dyngs/INEbase/es/operacion.htm?c=Estadistica_C&cid=1254736176963&menu=resultados&idp=1254735576863. Data is collected on the supply of rural tourism (number of open establishments, bedplaces, occupancy rate and staff employed, in estimates by type of accommodation and months) and demand (travellers, origin, overnight stays and average stay, by type of accommodation and months).

¹⁸ Escapada Rural (www.escapadarural.com), created in 2007, is the most important digital platform for rural accommodation in Spain and Portugal, with more than two million registered users, 35 million visits to its website and +18 000 associated accommodations in Spain (95 % of the total supply) and 2 000 in Portugal. The Rural Tourism Observatory (www.escapadarural.com/blog/otr) was created in 2012, in collaboration with CETT-UB (research institute of the University of Barcelona) and Netquest (a company dedicated to surveys and market research), which has so far produced 8 annual reports (2012, 2013, 2015, 2017, 2018, 2020, 2021) based on 154 071 surveys conducted among its members. The 2022 edition brings together data from surveys of 2 257 accommodations and 12 882 travellers. These are unofficial statistics.

¹⁹ Clubrural (www.clubrural.com) is a website for rural and active tourism, created in 1997 (until 2000 it was called Ruraltour). It has +28 000 establishments in Spain, Andorra and Portugal, and +15 million visits. It has been producing the annual Rural Tourism Barometer (www.clubrural.com/barometro-turismo-rural) since 2014, together with the Nebrija University. The 2022 edition brings together data corresponding to 14 000 accommodations and 200 000 travellers. These are unofficial statistics.

and participation in festivities linked to farm work or the tasting and/or purchase of agri-food products, handicrafts, etc." [...] "Agrotourism is also very easy to combine with other typologies of special interest, such as, for example, wine tourism, olive oil tourism, mycological tourism, or active tourism".

Another indirect source consulted is *Estudio del Tejido Productivo y Necesidades Formativas del Agroturismo en España* (Junta de Extremadura, 2020).²⁰ According to that study, "The real supply of agrotourism in Spain is unknown. No CNAE²¹ activity includes agrotourism activities, so the supply analysis is carried out by means of estimates" [...] "The supply of agrotourism in Spain is scarce: only 0.4 % of agricultural farms offer tourist services (3 600), compared to 20 % in more developed countries (France, Germany, Austria). Some experts speak of some 300 "pure" agrotourism establishments in Spain, although this estimate is too pessimistic. We can approximate a figure for the number of agrotourism businesses, based on the information analysed and on surveys of companies: it is suspected that there are between 4 000 and 5 000 agrotourism businesses in Spain" [...] "The supply of agrotourism is poorly structured. There is a lack of collaboration between the agents involved in the destination, a lack of clearer leadership from the public administration and greater coordination between regional and autonomous community policies. Agrotourism establishments are small, with a maximum capacity of 10 to 15 places. They are family-run micro-SMEs, in many cases self-employed without staff" [...] "Geographically, the supply is more developed in Northern Spain: País Vasco, Navarra, Asturias, La Rioja or Cantabria are leading agrotourism in Spain, showing a more extensive and better structured supply. Castilla y León, Canarias and Baleares show a certain degree of development. Andalucía, Extremadura and Castilla-La Mancha have a great potential still to be exploited".

Finally, it should be noted that within the framework of the STAY project, a survey was launched among the members of the Spanish Association of Rural Tourism (ASETUR),²² which includes about 8 000 rural accommodations (more than half of the sector), to gather data on the supply and demand in terms of agrotourism, training needs of the sector and other data of interest for the drafting of this national report. The response rate was very low (<0.1 %), so the results have been discarded as they are not representative of the reality of the sector.

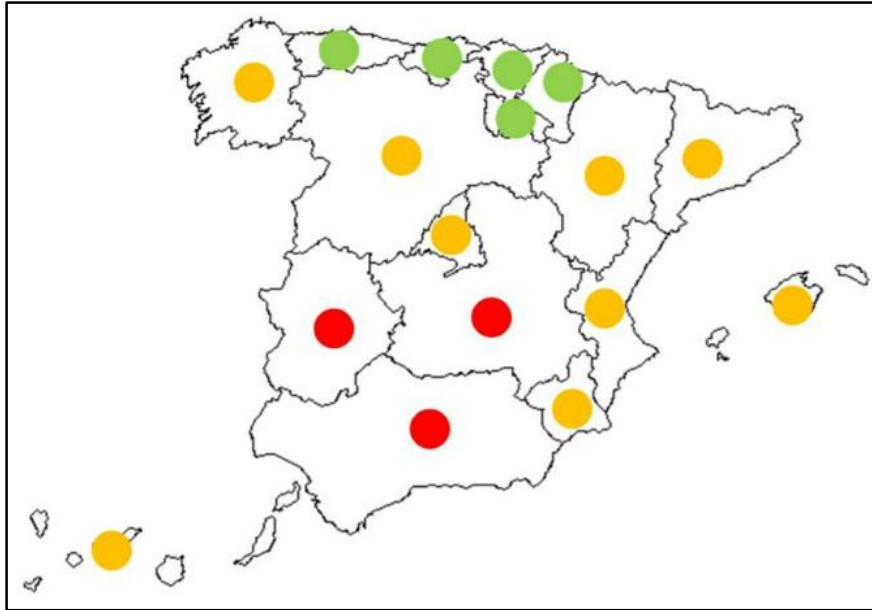
²⁰ Produced by the Higher School of Hotel Management and Agrotourism of Extremadura. Its results are based on interviews with experts (20) and surveys of current and potential agrotourism companies (800) in Spain.

²¹ The National Classification of Economic Activities (CNAE) allows classifying and grouping production units according to the activity carried out. The most common CNAE among rural accommodation in Spain is 552 ("Tourist and other short-stay accommodation").

²² www.ecoturismorural.com



Degree of agrotourism development in each autonomous community



Source: Junta de Extremadura (2020); p. 33

Green: agrotourism leaders

Yellow: some degree of development in agrotourism

Red: high potential in agrotourism, still to be exploited



Principado de Asturias is among among the communities most highlighted by the experts



3.2. Demand profile

According to *Survey of occupancy in extra-hotel tourist accommodation-EOAT* (Instituto Nacional de Estadística, 2022), the typical traveller who chooses rural accommodation is a national tourist, who mainly travels between April and September (70 % of overnight stays, half of them in July and August), with destination Castilla y León, with an average stay of 2.75 nights (3-4 nights in July and August). The total number of travellers exceeded 4.3 million (+28.74 % compared to the previous year). In context, overnight stays in non-hotel tourist accommodation (apartments, campings, rural tourism accommodation and hostels) reached 130.7 million (9.1 % in rural tourism accommodation).²³ Rural tourism accommodation offered, on average, 158 547 bedplaces (10.7 % more than in 2021). The average occupancy rate was 20.4 % (+10.8 %); 34.8 % (+17 %) on weekends. The preferred destinations were Castilla y León (745 384 travellers and 1.77M overnight stays), Cataluña (488 069 and 1.2M), Andalucía (394 174 and 1.31M) and Islas Baleares (388 780 and 1.39M), with Islas Baleares having the highest occupancy (56 % of bedplaces). Overnight stays in rural tourism accommodation reached 11.9 million (+22.31 %; especially for non-residents in Spain: +67.2 %, by +12.1 % for residents), although it is a mainly national market, with nearly 80 % of Spanish residents²⁴ (8.9M overnight stays). The average stay was 2.75 days (5 % lower than in 2021).

As in the case of supply, it is not possible to differentiate between agrotourism data and other modalities of rural tourism. Again, indirect sources can be used, such as the periodic reports produced by Escapada Rural and Clubrural (see chapter 4.1), but these are not specific data for agrotourism and, moreover, they are somewhat biased: the data are based on surveys of their respective clients.

Estudio del Tejido Productivo y Necesidades Formativas del Agroturismo en España (Junta de Extremadura, 2020) quoted above also includes an analysis of the demand for agrotourism in Spain: "According to the companies surveyed, the main agrotourism clients are families, with 51 %, followed by couples, with 20 %, which coincides with the opinion of the experts, and 11 % of free groups. Most agrotourism customers (63 %) are nationals, rather than international (18 %) and local tourists (19 %). Except País Vasco, due to the proximity of France, which has grown by 10-20 % in recent years" [...] "48 % of the accommodations surveyed has an average stay of 2 nights, usually coinciding with weekends, when travellers decide to rest and disconnect. These data are in line with the average stay in rural accommodation collected by the INE (average stay by type of accommodation, by community and autonomous cities, 2019)".

²³ In Castilla y León, Castilla-La Mancha and Extremadura, rural accommodations account for 15 % of total overnight stays. And in Comunidad Foral de Navarra, Cantabria and Principado de Asturias they exceed 10 % of the total. In contrast, in Canarias, Comunidad Valenciana and Comunidad de Madrid they do not reach 1 % of overnight stays.

²⁴ In Cataluña (94 %), Comunidad Valenciana (77 %), Comunidad de Madrid (76 %), Andalucía (74 %), Canarias (71 %) and Región de Murcia (64 %), most of the overnight stays in rural accommodation for national tourists are by travellers from the same community (INE, 2022). This is a clear phenomenon of proximity. The opposite is the case for Cantabria (6 %), Principado de Asturias (9 %) and La Rioja (11 %).

Pulido (2021) states that demand studies on agrotourism are scarce and focus on specific cases or experiences, so they are not generally applicable and it is hard to measure demand, although " we can say that, in the whole of rural tourism in Spain, this demand is a minority".

Soriano (2017) carries out a bibliographical review of the reasons that lead tourists to make this type of trip, mainly: gastronomy, which provides tourists with a quality sensory experience and the opportunity to savour something unique; relaxation and disconnection from reality; and practising leisure activities in a pleasant environment that is different from the usual one. Other motivations include preserving nature, spending time with family and friends, learning how products are made, consuming or buying fresh products, getting in touch with their roots, learning something new, etc.



Iberian pork products are jewels from Spanish gastronomy

3.3. The agrotourism business in Spain

According to *Survey of occupancy in extra-hotel tourist accommodation-EOAT* (INE, 2022), rural houses in Spain employed 18 902 people (monthly average). Per Junta de Extremadura (2020), the average number of workers in agrotourism enterprises is three people. Those are usually family businesses or self-employed. 88 % of the surveyed enterprises have less than five employees, and only 3 % have more than 25 employees. Businesses with more than 25 people are usually accommodations with a large guest capacity (large estates, manor houses, etc.) or active tourism businesses. The results show that the bulk (39 %) of the workers are 30-45 years old, followed by the range 45-55 years old (26 %). Employment turnover in agrotourism is very low in 87 % of the surveyed enterprises due to the family character of the businesses.

Pulido (2021) includes an assessment of **maturity** for several tourism typologies in Andalucía, according to Butler's life cycle of tourist destinations (1980): phases of exploration, involvement, development, consolidation, stagnation, decline and rejuvenation. Most of the consulted experts (50 % overall) considered agrotourism in the development phase. It also includes the evaluation given by the panel of experts regarding the development potential of the same tourism typologies, with agrotourism as one of the main ones (5.72 on a Likert scale of 1 to 7, with 1 being no potential and 7 being maximum potential). Gastronomy tourism (6.34), ecotourism (6.31) and wine tourism (5.78), with which agrotourism has many obvious points in common, receive higher ratings. Finally, the price for each type of tourism is estimated, with agrotourism being considered the most affordable (cheapest) among 30 types analysed, with 6.09 points on a scale of 1 to 7.

Regarding **associations** in the field of agrotourism, only seven among more than 100 local, regional and county rural tourism associations consulted included explicit references to the term "agrotourism" on their official websites: ARCA Asociación Regional de Casas de Aldea (Principado de Asturias),²⁵ Associació de cases Turisme Rural Girona-Costa Brava-Pirineu (Girona),²⁶ ABELORE, Asociación de Agroturismos de Navarra (Comunidad Foral de Navarra),²⁷ Turistrat Coop. V, Casas Rurales en el Interior de Castellón (Castellón),²⁸ Fundación Ecoagroturismo (headquarters in Principado de Asturias and local offices in several autonomous communities),²⁹ Confederació Catalana d'Agroturisme i Turisme Rural-CONCATUR (Cataluña),³⁰ and Asociación de Alojamientos Rurales de Euskadi-Nekatur (País Vasco).³¹ And only half of these include the term "agrotourism" in their denomination. Nekatur must be highlighted for being the first agrotourism association created in Spain, in 1991, under the name of Nekazalturismoa-Landaturismoa. Initially it was made up only

²⁵ <https://turismoruralasturias.com>

²⁶ <http://www.turismeruralgirona.org>

²⁷ <http://www.agroturismosnavarra.com>

²⁸ <http://www.turistrat.es>

²⁹ <https://www.ecotur.es/ecoagroturismo>

³⁰ <http://concatur.cat>

³¹ <http://www.nekatur.net>

of agrotourism establishments, but today it groups 232 rural lodgings, 70 % of the supply in País Vasco.

Some associations offer tourism services that can be assimilated to agrotourism (sale of agri-food products from local producers, visits to farms, etc.), but do not make any reference to the term "agrotourism". The case of Confederació del Turisme Rural i l'Agroturisme de Catalunya-TURALCAT (Cataluña),³² which even includes the term "agrotourism" in its name, is curious.

Regarding the **marketing** of agrotourism, it is mainly carried out through specific websites on rural accommodations that act as brokers, without discriminating among agrotourism and other rural accommodations. Some of the main ones are escapadarural.com, clubrural.com, rusticae.es, sensacionrural.es, casarurales.net, tuscasarurales.com, brujulea.net, miscasarurales.com, ruralgia.com, encantorural.com, etc.³³ Owners also use more generalist websites, such as booking.com or expedia.es. Once again, we find at the same level the "purest" agrotourisms, more in line with the model proposed by our STAY project, and other types of rural accommodations with a more arguable (and often non-existent) link to agricultural activity.

Concerning the promotion of agrotourism by **public authorities**, it is worth highlighting the work of Generalitat Valenciana, which includes a section devoted to agrotourism on Turisme de la Comunitat Valenciana's website.³⁴ Turisme Comunitat Valenciana publishes a *Catalogue on agrotourism, olive oil tourism and fish tourism experiences*, within the framework of the Creaturisme strategy,³⁵ whose main objective is to promote the differentiation of the Valencian tourism supply and the development of sustainable tourism products suitable for commercialisation. In April 2021, 117 businesses³⁶ were registered in the "Agrotourism" section, including 38 providing accommodation (among other services). The 2022 edition of the catalogue includes 28 offers, 15 of which are agrotourism. And the *2023 B2B Catalogue of tourism experiences*³⁷ includes 12 agrotourism experiences. And all despite rural accommodation in this territory does not reach 1 % of overnight stays.

³² <https://www.catalunyarural.cat>

³³ Rural tourism in Spain pays €150,000/day to booking platforms (Booking, AirBnB...), a "waste of resources with very little return for the rural environment" (according to sources consulted by ASETUR).

³⁴ <https://agroturismo.comunitatvalenciana.com/agroturismo-comunitat-valenciana>

³⁵ <https://creaturisme.comunitatvalenciana.com/creaturisme>

³⁶ Both accommodation and activity companies are included. For accommodation, among the mandatory requirements are the following: "22. Has agro-experiences to be carried out in its facilities or with third parties" and "23. If it has a restaurant, it has a minimum of 25 % of its dishes made with agri-food products from the Valencian Community".

³⁷ <https://creaturisme.comunitatvalenciana.com/sites/default/files/2023-01/Cat-producto-b2b-2023.pdf>. This includes both accommodation on agricultural estates ("rural accommodation and grazing with sheep") and recreational activities ("lunch in the Valencian orchard", "beer experience" or "paella workshop in our house in the orchard").



Participar en las labores de la agricultura tradicional, recogiendo naranjas y degustando sus diferentes variedades, conocer de cerca el cultivo de un super alimento como es la chufa, y participar de la elaboración de la orxata, ser apicultor por un día, o pastor, o elaborar un queso de manera artesanal, alojarse en una masía donde se practica el slow food... estas son algunas de las propuestas ligadas al agroturismo en la Comunitat Valenciana.

Take part traditional farm labouring work, pick oranges and taste the different varieties, get up close to learn about how a super food like the chufa (tiger nut) is grown and try your hand at making orxata (tiger nut milk). Be a beekeeper or shepherd for the day, learn how to produce handmade cheese, stay at a farmhouse where they practise "slow food"... these are just some of the things you can do on the theme of agrotourism in the Region of Valencia.

agroturismo.comunitatvalenciana.com

Source: Catalogue of agrotourism, olive oil tourism and fish tourism experiences, Creaturisme (2022)



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Un día en la naturaleza; haz tu propio queso
Les Coves de Vinromà (Castellón)

DESCRIPCIÓN
Pasa una mañana rodeado de naturaleza, verás la granja de las ovejas, cómo se ordeñan. En la quesería te explicaremos cómo se elabora un queso, la diferencia que hay entre ellos y también podrás elaborar tu propio queso fresco; verás cómo la leche líquida se transforma en sólida. Finalizaremos con una cata de 8 quesos diferentes tanto de leche pasteurizada un semi curado de 2 meses de

curación, curado de 6 meses, el cajejo de 12 meses, de hierbas aromáticas, trufa, y de leche cruda; uno de 4 meses y por último uno de 18 meses, probarás todos estos quesos que están hechos utilizando la misma clase de leche y así embargo cada uno de ellos sabe diferente. Es la magia del queso.

INFORMACIÓN ADICIONAL
Se pueden adquirir quesos por compra online y también en la quesería.

A day in nature. Make your own cheese
Les Coves de Vinromà (Castellón)

DESCRIPTION
Spend a morning surrounded by nature, you will see the sheep farm, how they are milked. We will explain you how a cheese is made, the difference between them, and you can also make your own fresh cheese: see as milk is liquid and becomes solid. Finally, we will taste 8 different cheeses, both pasteurized milk, or 2-month semi-cured, 6-month cured, the 12-month old, flavored herbs, truffle, and milk raw

one of 4 months and finally one of 18 months, you will taste all these cheeses that are all made from the same milk and each one of them tastes different.

ADDITIONAL INFORMATION
You can buy cheeses by buying online and also in the cheese factory.



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El Mas de les Garroferes te espera
Les Useres / Useras (Castellón)

DESCRIPCIÓN
El Mas de les Garroferes es un proyecto basado en el respeto y el amor por el entorno, en pleno Pla de les Useres (Castellón), entre algarrobos, olivos, viñedos y cañales. Se trata de una casa rural con capacidad para 8 personas y amplias zonas exteriores, aparcamiento privado, piscina exterior con solarium, diferentes terrazas, jardines y barbacoa. Aquí, la vida espera.

INCLUYE
Hospedaje mínimo 2 noches - capacidad máxima de 8 personas.

SERVICIOS ADICIONALES
Larga estancia y celebración de eventos (consultar tarifas). Null €.

Mas de les Garroferes (House of the Carob Trees)
Les Useres / Useras (Castellón)

DESCRIPTION
"Mas de les Garroferes" (House of the Carob tree) is a project based on the respect to the environment, in Les Useres (Castellón), in the middle of carob trees, fields, olive trees, vineyards and cellars. It is a country guest house for 8 people with large outdoor areas, such as private parking, swimming pool, terraces, gardens and barbecue. Here, life can wait.

INCLUDES
Minimum stay 2 nights - 8 people maximum.

ADDITIONAL SERVICES
Long stay and events (ask rates), null.

Source: Catalogue of agrotourism, olive oil tourism and fish tourism experiences, Creaturisme (2022)

There are no specific **quality norms and standards** for agrotourism. For rural tourism, there are different categories of accommodation: the classification in ears of wheat for rural accommodation members of ASETUR,³⁸ the Ceres Ecotur quality system (ECOLABEL ECEAT certificate) from

³⁸ Analogous to the hotel stars, the main objective of the classification by ears of wheat is to simplify the promotion of rural tourism accommodation. In order to determine the number of spikes, the level of equipment and services in these accommodations is taken into account. It was launched by ASETUR in 2007.



Fundación Ecoagroturismo,³⁹ the green star categorisation systems⁴⁰ for rural accommodation in the autonomous communities⁴¹ and the system of ears of wheat for rural accommodation in Cataluña.⁴² But these are not state-wide initiatives: there is no official homogeneous classification for rural tourism throughout Spain.

ASETUR's classification in ears of wheat for rural accommodation



³⁹ The Ceres Ecotur Project quality system was born in 2008. It was a pioneering initiative that sought to unify accommodation, activity companies and gastronomy initiatives under common parameters of preservation and dissemination of rural heritage and the environment. The first 15 initiatives were certified in 2010. The network currently includes accommodations in Spain, Portugal and Latin America.

⁴⁰ To further confuse consumers, in 2020 the MICHELIN Guide began awarding green stars to the most environmentally committed restaurants in Spain and Portugal. <https://guide.michelin.com/es/es/articulo/news-and-views/seis-preguntas-sobre-la-estrella-verde-michelin>

⁴¹ Promoted in 2013 by the Ministry of Industry and Tourism, within the framework of the National and Integral Tourism Plan 2012-2015, with the favourable votes of all the autonomous communities except Cataluña, this system is currently in force in Cantabria, Castilla y León, Comunidad Foral de Navarra, Comunidad Valenciana, Extremadura, Islas Baleares, Principado de Asturias and Región de Murcia (www.rtve.es/noticias/20130408/comunidades-autonomas-utilizaran-estrellas-para-clasificar-alojamientos-rurales/633842.shtml).

⁴² Categories system for rural tourism establishments, comparable to hotel stars. There are currently around 2 000 registered accommodations. A distinction is made between rural accommodation (green ears) and agrotourism (ochre ears).

3.4. Needs and new trends

At the time, experts pointed out that the global pandemic caused by COVID-19 would impose new rules on international tourism flows and obvious changes in demand and tourism consumption models: a collapse in international tourism, acceleration of the digitalisation process that the sector was already undergoing (big data, artificial intelligence, IoT and sensors, telematic processes), changes in tourists' priorities (more concerned about their safety and health, demand for open spaces that ensure social distance, tranquillity and freedom, greater interest in nature, etc.).

According to forecasts, less crowded, sustainable and close experiences would be sought in this first stage, guaranteeing confidence and a sense of control. This would confirm a trend in tourism demand: the recovery of the sector would be driven by family, domestic tourism; travelling by car and to local destinations, which would benefit villages and rural areas. Uncertainties regarding vaccine effectiveness for COVID-19 and the emergence of new strains (and other future pandemics), together with partial lockdowns and restrictions on mobility among territories, suggested that this trend in demand could be extended over time. A more than encouraging scenario for rural tourism and agrotourism, due to the defining characteristics of these practices.

For instance, European Commission's *Flash Eurobarometer 499* (November 2021), entitled "Attitudes of Europeans towards tourism",⁴³ included a question on what respondents thought about the long-term effects of COVID-19 on their travel behaviour. "More holidays at home", 'change in destination countries', 'change in holiday activities', 'change in type of destination', 'change in mode of transport' or 'change in type of accommodation' were some of the multiple choice answers. The results for Spain (with values ranging from 24 % to 46 %) surpassed the European average in all of them.

The forecasts were indeed too optimistic, even innocent, although some are starting to be noticed in the markets. An example is the increase of 28.74 % of travellers and 22.31 % of overnight stays in rural accommodation in 2022 (INE, 2022).

The conclusions of the 1st International Inland Tourism Congress in Andalucía⁴⁴ pointed out the importance of micro-segmentation,⁴⁵ which is once again highlighted in its second edition: "We are witnessing a new era, in which tourism activity is based on micro niches, very small in size, but tremendously profitable. Knowing how to identify needs and satisfy them becomes one of the main challenges for companies and destinations" (University of Jaén, 2022). Thus, differentiation, authenticity and innovation are identified as the three keys to the development of micro-segments in inland tourism.

⁴³ <https://europa.eu/eurobarometer/surveys/detail/2283>

⁴⁴ Organised in Úbeda (Jaén) by the Chair of Inland Tourism of the University of Jaén, in February 2020.

⁴⁵ It arises from the need for companies to adapt to a global environment, in which customers require new, specialised and innovative forms of tourism, allowing marketing to identify unique demand segments. In addition, micro-segments of inland tourism contribute to the deseasonalisation of demand, decentralisation (a more equitable distribution of tourists) and an increase in overnight stays.

Given an experienced consumer and leisure time available to millions, we have moved from mass production and consumption to a personal and individual consumer desire, leading to a tourism product on demand. Special interest tourism, they call it: gastronomy tourism, ecotourism, astrotourism, etc. The inland tourist is looking for deep, transformative experiences and personalised treatment. One tourist, one destination, one experience.

In this context, agrotourism can play a key role. At least, certain circumstances are present to make it happen: "The consumer wants to get in touch with rurality and the countryside, either to find his or her roots or simply to disconnect from the city. Many generations of today's urban societies no longer maintain their family ties with the rural environment and, consequently, are attracted by an unfamiliar space" [...] "The tourism products of inland destinations must reflect the identity of the territory and must focus on demand segments committed to the local culture of the places to which they travel" [...] "Inland destinations must reflect the identity of the territory and must focus on demand segments committed to the local culture of the places where they travel" [...] "Inland destinations must make an effort to transform existing resources and even tourism products into emotions that make the tourist experience memorable so that tourists are willing to spend more time in the destination and spend more money. Ultimately, if destinations cannot excite tourists during their visit, they will hardly be considered by the potential customer" (University of Jaén, 2020).

Thus, some of the most recent trends in rural tourism can be applied to agrotourism: tourists are looking for deep and transformative experiences, personalised treatment, adapted and personalised tourism micro products, etc. Thus, learning to milk a cow, shear a sheep, feed livestock, make cheese or bread, pick fruit or participate in tilling the land are some of the experiences that agrotourists can live to escape urban life. Some activities not so directly linked to life on the farm, but complementary and compatible, can even be incorporated, such as orange or creative tourism (e.g. making handicrafts), wellness (in a broad sense: forest baths, meditation, yoga, mindfulness, massages) or ornithological tourism. Regenerative tourism? Where better than in the rural environment? An agrotourism 2.0, in line with new times, but without losing the essence or the link with the agrarian, with the decisive factor in the choice of holiday destination: living the experience on the farm.

It may even be compatible with another new trend: digital nomads, long-term travels combined with teleworking (especially for foreigners). No doubt the lockdown and the COVID-19 pandemic have boosted it. As an example, the Junta de Andalucía's "Andalucía is calling" campaign⁴⁶ (November 2022-April 2023, €950 000 investment, targeting UK, Germany, Netherlands, France, Ireland, Belgium, Norway, Denmark, Finland, Switzerland and Sweden), in the framework of the

⁴⁶ www.juntadeandalucia.es/organismos/turismoculturaydeporte/servicios/actualidad/noticias/detalle/385753.html

META 2027 General Plan for Sustainable Tourism in Andalucía. The challenge here is to improve Internet connectivity in rural areas, which is one of the shortcomings of these territories.⁴⁷

As a final note, Junta de Extremadura (2020) gathers the needs for innovation in agrotourism businesses. According to the surveys, 50.96 % refer to the improvement of Internet access facilities, 17.31 % to the improvement and/or modernisation of management systems, 11.54 % to the improvement and/or modernisation of sales systems, 7.69 % to the improvement of access to new technologies and 5.77 % to the improvement and/or modernisation of production systems.

3.5. The challenge of digitalisation in agrotourism

Tourism is one of the sectors that is most intensively incorporating technology. Inland tourism stakeholders must use technologies to innovate and offer new products, services and business models to their customers, as well as reinvent themselves, improving their processes and the quality of their products (University of Jaén, 2020).

It is also partly a legacy of the pandemic. Most industries are experiencing the results of technological advances and the growing predominance of the digital world and we are increasingly dependent on the Internet and social networks in the personal sphere. Thus, sectors such as training and tourism are increasingly incorporating digital and telematic tools and processes: artificial intelligence, teleworking, telematic meetings, webinars, digital marketing, social networks, online services, sensors and process automation, etc. Technology adoption in tourism is mostly related to marketing and distribution, and is less oriented towards productivity improvement, while more advanced technologies (big data, customer relationship marketing, etc.) are still under-represented.

According to *Estudio del Tejido Productivo y Necesidades Formativas del Agroturismo en España* (Junta de Extremadura, 2020; p. 44), 30 % of the surveyed enterprises engage their customers through intermediaries, usually through digital channels,⁴⁸ where companies showcase their products and even market them. Almost 40 % of businesses own a website or social media profiles. In terms of digitalisation, 88.46 % have their own website (although only 23.08 % allow online purchases) and 72.12 % promote their business on social media.

The above mentioned study (Junta de Extremadura, 2020; p. 48) also lists the innovation needs of those companies: "half of the businesses state that they need to improve Internet access, which is because sometimes rural establishments have problems with Internet access. Almost 20 % of the answers point to improving management systems (invoicing, accounting, booking management and others), and almost 12 % need to modernise their sales channels".

⁴⁷ https://www.eldiario.es/tecnologia/21-espana-rural-sobrevive-conexion-internet_1_8475949.html

⁴⁸ In that sense, the *EU Flash Eurobarometer 499* (<https://europa.eu/eurobarometer/surveys/detail/2283>) indicated in November 2021 the following as the most likely methods to organise travel and tourism activities: online platforms combining travel services (accommodation, car rental, flights, etc.), UE 25 %, ES 30; website of a hotel, airline company, UE 24 %, ES 29 %; over the counter (travel agency or transportation company), UE 19 %, ES 27.

Based on the surveys carried out, the main innovation needs in agrotourism are (Junta de Extremadura, 2020; p. 48):

- Marketing and online commercialisation. There is a clear trend towards implementing online marketing tools: web, e-commerce, social networks, as well as the development of mobile applications with different functionalities for the customer (destination information, routes, complementary services, etc.).
- Management and invoicing programmes. Especially in the agricultural world, management is outsourced to specialised consultancies, so owners are unaware of much essential information to be able to make decisions that improve the competitiveness of their businesses.
- Automation of processes with customers (e.g. chatbox) and employees (e.g. onboarding). Recently, there has been a move towards customer relationship technologies that minimise contact and eliminate the need for customer service staff.

On the other hand, at the beginning of 2023, within the framework of FITUR, the Federación Digital de Turismo (FEDITUR),⁴⁹ a national alliance of rural and inland tourism associations whose objective is to advance the digitalisation of the sector, was presented. Currently (April 2023) it is made up of (Murcia), CCA Lucena (Córdoba), Asociación Valle de Lecrín (Granada), Bidelagun, Valle de Sakana (Navarra), La Manchuela (Albacete), Arca (Asturias), Ascarioja (La Rioja), Anear (Cantabria), INTUR CLM (Castilla La Mancha) and Nekatur (País Vasco), while the company Exploravia is a technological partner.

FEDITUR was created to help the rural and inland tourism sector implement new technologies to manage its establishments to maximise profitability and operational efficiency and provide advanced management technology services. Digitalisation, therefore, provides an opportunity for collaborative, networked work. Among other aims of the federation, its statutes include the following:

- To expose to the competent authorities and entities the relevant needs and suggestions to improve tourism planning by advocating a good Internet connection that links the current digital structure with the physical resources.
- To integrate the accommodation supply with complementary activities and quality products as much as possible by creating tourism products presented in digital mode, acting in the rural tourism value chain and taking on the demographic challenge and the digital transformation as a special objective.
- To promote and disseminate the traditional and craft trade through the Internet and social networks.

⁴⁹ <https://feditur.org>

3.6. Training on agrotourism in Spain

"Another pressing need in the sector is training. Companies feel that there is no training, or that it is blurred again, as it is aimed more at rural tourism than at agrotourism. Once again, rural tourism platforms are making a great effort to update the knowledge of professionals in the sector through training pills. Town councils and other public bodies are also developing training leading to certificates of professionalism, but the training supply is not adequately structured and often does not reach the people interested in developing their professional project in agrotourism".

Estudio del Tejido Productivo y Necesidades Formativas del Agroturismo en España
(Junta de Extremadura, 2020; p. 54).

"It is needed to continue supporting the professionalisation of inland tourism, which requires promoting the training of professionals and entrepreneurs in all phases of the development of the destination and to do so on an ongoing basis".

1st International Inland Tourism Congress in Andalucía, conclusions (2020).

"There is a time mismatch between the evolution of the current university tourism supply and the reality of tourism activity, being necessary that the regulations and procedures for modifying qualifications are quicker in order to best respond to the needs of society".

2nd International Inland Tourism Congress in Andalucía, conclusions (2020).

There are no official university studies on agrotourism at degree level in Spain. In any case, some universities include certain contents in the Tourism (or similar) degree curricula, but with scarce relevance. Neither do it for rural tourism. Without any doubt, the lack of knowledge on the real scope of agrotourism in our country, and by extension on the demand for university training in this field, is a limiting factor for universities to offer training programmes in this area. On the other hand, tourism degree courses are currently undergoing in-depth debate in Spain: a conference of university deans is reviewing them in order to adapt them to the needs of the market. The existing degrees are too generic, leaving specialisation to the Master's degrees.

There are some isolated initiatives at the university level, such as the Master's Degree in Agroecology, Rural Development and Agrotourism⁵⁰ from Miguel Hernández University in Elche (taught at the Higher Polytechnic School in Orihuela, in hybrid mode, and which was the first official Master's Degree in agroecology to be introduced in Spain in 2007). Alternatively, the Chair of Agrotourism and Wine Tourism of the Canary Islands⁵¹ from University of La Laguna and the

⁵⁰ <https://agroecologia.umh.es>

⁵¹ <https://wp.ull.es/aenogas>

Government of Canary Islands through the Canary Islands Institute of Agri-food Quality, which promotes research and knowledge transfer in the field of agrotourism and wine tourism.

Vocational education and training studies are organised in Spain according to professional families. None of them explicitly include agrotourism in their curricula, not even the "Agrarian" or "Hospitality and tourism" families, so it is impossible to study agrotourism at VET level in Spain.

The certificates of professionalism are the official accreditation instruments for the professional qualifications from the National Catalogue of Professional Qualifications for the labour administration. They are organised in 26 professional families and three qualification levels. Each certificate recognises the set of professional competences that enable the development of occupational activity, and corresponds to a structured professional profile. In other words, to a certain extent, they accredit the knowledge in that subject acquired through professional activity, not through academic training. The certificate includes the training associated with that profile, which must be completed with internships in workplaces.

The certificates are official and valid throughout the national territory and are issued by the State Public Employment Service (SEPE) and the autonomous communities.

The National Directory for Certificates of Professionalism groups the certificates into 26 professional families. Within the Hospitality and Tourism sector is the professional area of Agrotourism with two certificates of professionalism: Rural Accommodation and Keepers of mountain shelters and hostels.

In the field of Vocational Education and Training, it is also worth highlighting the existence of Escuela Superior de Hostelería y Agroturismo de Extremadura-ESHAEX (Higher School for Hospitality and Agrotourism), located in Mérida, which has been a National Reference Centre in Agrotourism⁵² since 2014. In the field of Vocational Education and Training, it is also worth highlighting the existence of the Higher School of Hospitality and Agrotourism of Extremadura (ESHAEX), located in Mérida, which has been a National Reference Centre in Agrotourism since 2014. It was created by Decree 89/2011, of May 20th, as an integrated Vocational Education and Training centre based on state-of-the-art facilities. Its aim is to become a benchmark for high quality education where the best professionals are trained in the specialities linked to the professional family of hospitality and tourism. It depends on the Extremadura Public Employment Service. In 2019, an agreement was signed between the State Public Employment Service (SEPE), the Ministry of Education and Vocational Training and the autonomous community of Extremadura to approve the centre's Multiannual Action Plan 2019-2022, one of whose results is the agrotourism study quoted several times in this National Report.

⁵² <https://crnagroturismo.juntaex.es>

In terms of non-formal education, a "Course on agrotourism monitoring" (continuous training for employees, diploma issued by the training provider)⁵³ has been identified, with 300 hours of duration, delivered online by Euroinnova International Online Education, which is a private non-classroom-based training school with more than 20 years of operation.

To conclude this chapter, a note on the level of training in agrotourism businesses. According to Junta de Extremadura (2020), agrotourism businesses' staff training level is diverse: 31 % of the staff with university studies, 14 % with baccalaureate or VET and 5 % with professional certificates. 38 % of businesses claim to provide continuous training to their employees (often through rural tourism associations and platforms), while 25 % of businesses do not provide training to the staff.



Agrotourism attractions in Spain are many and diverse

⁵³ <https://www.euroinnova.edu.es/curso-monitor-agroturismo#>. Two more courses are also available which offer a joint qualification combining this agrotourism instructor course with another training programme.

4. SWOT analysis

As a conclusion, this report includes an analysis of the agrotourism sector in Spain. For this purpose, a bibliographical review of several specialised texts on rural tourism and agrotourism has been done. In addition, in-depth interviews with experts in agrotourism have been carried out as a complement.

An adaptation of the SWOT analysis has been chosen,⁵⁴ as it is a widely known and used method and because it allows for an easy synthesis of the main elements to be taken into account in this "X-ray" of agrotourism in Spain in mid-2023.



Rural depopulation

⁵⁴ The SWOT analysis is a common tool both in strategic plans and in business plans or market research. Its purpose is to find out the real situation in which an organisation, company or project finds itself, as well as the risks and opportunities it faces in the market, in order to be able to plan a strategy for the future. SWOT stands for Strengths, Weaknesses, Opportunities, and Threats. The methodology consists of four consecutive stages: external analysis (opportunities and threats), internal analysis (strengths and weaknesses), SWOT matrix and strategy.

SWOT analysis on agrotourism in Spain

Strengths	Weaknesses
<p>A large number of natural and heritage attractions. Non-seasonal offer. Increase in national rural tourism. No dependence on international markets. Authentic, non-overcrowded tourism. Close contact with the hosts (rural knowledge). A strong linkage of the supply with the local culture. Contribution to rural development.</p>	<p>No official data available.^{C1 C2} Atomisation and dispersion of supply. Undifferentiated, ambiguous supply.^{C3} Wide heterogeneity of regulations and types of accommodation.^{C4} Insufficient training offer for entrepreneurs. Lack of institutional support and complexity of administrative procedures. Barriers to adaptation to new technologies. Poor Internet connection in rural areas.^{C5}</p>
Opportunities	Threats
<p>Social and demographic changes (increase in life expectancy and pensioners, greater concern for health, etc.). Compatibility with new demand trends (micro-segments, experiences, wellness, nature, activity, proximity, digital nomads, etc.). Synergies with other models: gastronomy tourism, wine tourism, olive oil tourism, ecotourism, etc. Excellent value for money. More "eco" travellers. Improved accessibility to rural areas. Digitalisation. Enhancing the value of the supply and differentiated promotion and marketing. European Union's Green Deal and "Farm to Fork" strategy.</p>	<p>Inflation. Economic and political uncertainty. Rural depopulation. Energy crisis. Denaturation of supply. Unfair competition from holiday houses.^{C6}</p>

Source: Own elaboration (2023)

For ease of reading, a simple SWOT matrix is presented, to which a number of comments have been added, as listed below:

C1. "Another issue of concern for businesses is the lack of reliable studies and data on supply and demand. There is a need for a national agrotourism observatory" [...] "Some experts point to the need to create a specific CNAE for agrotourism" (Junta de Extremadura, 2020; p. 54). However, the proposal to create an agrotourism observatory raises a question: how is it financed and which entity assumes its management and continuity?

C2. (About obtaining agrotourism statistics) “Maybe just a PhD student in any Spanish university willing to do the research on the topic with the help of a scholarship from any entity would be enough” (Juan Ignacio Pulido’s interview).

C3. "Agrotourism has been assimilated as rural tourism, when they are different and not comparable activities. Thus, many companies are using agrotourism as marketing and offer experiences not typical of the sector. This lack of homogenisation of what should be considered agrotourism is a reflection of the regulatory diversity of rural tourism and agrotourism in the different regions" (Junta de Extremadura, 2020; p. 54). There are no specialised promotion and marketing channels for agrotourism, so it is very difficult to differentiate them from other rural accommodation. Sometimes, even those accommodations promoted as agrotourism are not really agrotourism, as they do not complement agricultural income. It is important to differentiate this type of accommodation for its uniqueness, originality, authenticity and overall quality.

C4. Considering the diversity of objectives followed by regional regulations, Cànoves *et al.* (2006) proposed the grouping of existing typologies and designations at national level to facilitate their commercialisation, based on: the existence or absence of agrotourism, the location of the house (inside or outside the town centre), the rental of rooms or of the entire house and the quality levels.

C5. 5.6 million Spaniards are unable to connect to the Internet regularly. Rural dwellers connect 10 % less per day than the Spanish average, use 9 % less instant messaging applications, 13 % less e-mail, listen to 12 % less streaming music, watch 10 % less videos, consult 8 % less media websites and make 13 % less video calls.

<https://www.elindependiente.com/economia/2022/02/06/la-espana-rural-se-abraza-a-las-operadoras-locales-para-no-perder-el-tren-de-la-conectividad>

C6. The complexity of legal procedures is a recurrent complaint of rural accommodation owners. For this reason, the growth in the number of holiday homes represents unfair competition (the legal requirements for these accommodations are lower) for those owners who comply with all the legal requirements for rural tourism. This is a growing phenomenon not only in urban or coastal destinations (<https://diposit.ub.edu/dspace/bitstream/2445/174919/1/705630.pdf>), but also in some rural areas, such as in Cataluña. And these are not always individual initiatives, but are sometimes large investments by real estate groups that manage to build hundreds of properties in rural areas that had little accommodation supply.

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