



**European Committee
of the Regions**

**Commission for
Natural Resources**

NAT

Tourism and rural development



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Foreword by Alves Vasco Cordeiro

President of the European Committee of the Regions

This study is the first publication jointly delivered by the European Committee of the Regions and the United Nations World Tourism Organization. It is a clear example of how our mutual cooperation can bridge the local and the global levels in the pursue of our common objectives. It draws on the policy expertise of both organisations and highlights the potential of rural tourism to strengthen the economic, social and environmental sustainability of rural areas, contributing therefore to building resilient regional and local communities.

Free movement has always been at the heart of the European project: bringing people together, crossing borders, discovering new places and still feeling at home. As part of this mobility, one could say that tourism has helped shaping our European identity. It is also a powerful driver for growth and jobs, able to breathe new life into communities in all corners of Europe.

This publication calls attention to regions that account for 83% of the EU's territory and almost 30% of population: rural areas. As diverse as they are, rural areas face a unique set of challenges, including demographic changes, risk of poverty, and a lack of access to basic services. This study looks at these vulnerabilities and demonstrates how a masterful mix of inspiration, right policy tools and funding opportunities may support and develop rural tourism activities. By doing so, we can address depopulation, help to reduce inequalities, rekindle local economy and support the sense of ownership of local traditions in these regions.

The European Committee of the Regions places rural areas at the top of its priorities, because as local and regional representatives we know that to achieve a sustainable future, the European Union needs strong rural areas with the full participation of rural communities into the European project.



**European Committee
of the Regions**



Foreword by Zurab Pololikashvili

Secretary General of the United Nations World Tourism Organization

Tourism has the potential to transform societies through stimulating local economic development, reducing inequalities, addressing depopulation, and empowering local communities. Such potential is especially strong in rural areas everywhere.

Recognising this, the World Tourism Organization (UN Tourism) is proud to collaborate with the European Committee of the Regions on this important, first-of-a-kind study on the key challenges and opportunities of tourism contributing to rural development in Europe, in line with the long-term vision for the European Union’s (EU) rural areas.

Through the sharing of best practices in rural tourism drawn from concrete projects across Europe, as well as focused insights based on interviews with experts, the study effectively complements the UN Tourism for Rural Development Programme. In particular, this study sits alongside the recent UN Tourism Reports on “Tourism and Rural Development: A Policy Perspective” and “Tourism and Rural Development: Understanding Challenges on the Ground – Lessons learned from the Best Tourism Villages by UN Tourism Initiative”, as well as the flagship initiative and extensive network of the UN Tourism’s Best Tourism Villages, now in its third successful edition.

Alongside a comprehensive overview of policies and case studies, the report also provides recommendations based on an analysis of EU funding opportunities. Furthermore, it offers suggestions to improve the alignment of such funds, which are distributed at the national-level, and their intended impact on the livelihoods of rural tourism stakeholders, together with Europe’s wider climate ambitions and rural development policies.

Finally, in line with the European Year of Skills 2023, the report recalls the need to progress skills development, particularly green and digital skills, investments in vocational training, and education. This way, the employment prospects for the next generation of rural tourism professionals can be improved across the region.

We trust this joint effort will advance policies supporting tourism and rural development in Europe while also inspiring other regions around the world.



UN Tourism

UNITED NATIONS
WORLD TOURISM ORGANIZATION

Executive summary

This study analyses both the impact and potential of tourism to foster rural development across the European Union (EU). Its purpose is to provide local governments with actionable insights, enabling them to harness the benefits of tourism in rural EU regions effectively.

Drawing on a diverse set of research methods, including interviews, case studies, and comprehensive desk research, the study sheds light on the resilience of rural tourism, particularly in the post-COVID19 times, marked by a discernible surge in popularity, especially among local travellers.

Rural tourism, extending beyond conventional farms stays, emerges as a vehicle for economic diversification, job creation, and the sustenance of local services. Its growth may however be hampered by inadequate infrastructure, limited financial resources, and declining local populations.

The development of rural tourism contributes to economic expansion of rural areas and preservation of their cultural heritage, while fostering community participation. Nonetheless, if not managed properly, it may bring about challenges, including environmental impact, economic disparities, and changes in local dynamics.

The study also scrutinises the Long-Term Vision of Rural Areas (LTVRA) and assesses its connection with the tourism ecosystem in general. It analyses funding for tourism in rural areas in the past programming period and offers insights from three regions in Spain, Poland and Portugal, that successfully created new rural tourism strategies.

In conclusion, this study underscores the pivotal role of rural tourism, offering pragmatic recommendations for local governments. It recognises data limitations and advocates for better data collection and analysis to inform policymaking. Looking ahead, the study calls for ongoing research to deepen our understanding of the intricate relationship between tourism and rural development, ensuring a sustainable and prosperous future.

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1. Introduction

As emphasised by the European Commission’s President, Ursula von der Leyen, “Europe would not be whole without its countryside”, rural areas are a core part of the social identity and economic potential of Europe.¹ They are home to 137 million people, and over 80% of Europe’s territory.²

These territories, including peripheral islands, mountainous areas, agricultural hinterland and many more, are widely recognised and valued for food production, management of natural resources, protection of natural landscapes, as well as recreation and tourism.³ However, they face a set of challenges – including demographic changes, lower transport infrastructure density, lower access to training and high-quality education, fewer employment opportunities, and a higher risk of poverty.

On top of that, although a quarter (25%) of the population of the EU live in rural areas,⁴ this rate has been falling gradually over the years, mainly due to the out-migration and ageing of the societies.⁵ It is expected that by 2050 the population in European rural areas will have decreased by more than 10% compared to 2022.⁶ Furthermore, people in rural regions generally have a lower level of income than their counterparts in cities, towns and suburbs.⁷

To ensure that rural areas can continue to play an essential role in the EU, the European Commission has set out its Long-Term Vision for the EU’s Rural Areas (LTVRA) up to 2040 that identifies areas of action to ensure stronger, connected, resilient and prosperous rural areas and communities. One of the policy areas that is seen as an opportunity is rural tourism. It is believed that rural tourism can be a sector that brings new possibilities to local rural communities and helps rural ecosystems, generating new momentum that increases the region’s attractiveness.

¹ EC (2021). *Communication From The Commission To The European Parliament, The Council, The European Economic And Social Committee And The Committee Of The Regions Empty A Long-Term Vision For The EU's Rural Areas – Towards Stronger, Connected, Resilient And Prosperous Rural Areas By 2040.*

² Ibidem.

³ Ibidem.

⁴ Eurostat (2022), *Urban-rural Europe – income and living conditions.*

⁵ Eurostat (2022). *Urban-rural Europe – demographic developments in rural regions and areas.*

⁶ Ibidem.

⁷ *Mean and median income by degree of urbanization* (Eurostat database).

Although tourism has been one of the relevant sources of development in rural areas since the 1970s, with the new opportunities now being brought by changes in consumption pattern and new ways of living, it currently holds considerable potential for stimulating local economic growth and social change. By creating effective complementarity with other economic activities, its contribution to GDP and job creation, and its capacity to spread out demand throughout the year and across a wider area, is growing.

The aim of the study is to provide a brief analysis of the main barriers and enablers of tourism as part of rural development in the European Union (EU) from the perspective of subnational governments. By analysing the trends in rural tourism development, and identifying challenges as well as opportunities, this study also examines policies and financing mechanisms supporting the development of rural tourism. It aims to equip local and regional authorities with knowledge and policy recommendations facilitating the implementation of rural tourism in rural areas.

The study is based on a mixed-method approach, including desk research complemented by insights from 8 interviews with relevant stakeholders,⁸ and case studies of regional policies for rural tourism development.

⁸ The interview questionnaire and list of the interviewed stakeholders are included in Annexes I & II of the report.

2. Definition of rural tourism and its role in promoting rural development in the EU

2.1. Tourism and rural development

According to the World Tourism Organization (UN Tourism) **tourism** is defined as “a social, cultural and economic phenomenon which entails the movement of people to countries or places outside their usual environment for personal or business/professional purposes”.⁹

Several categories of tourism can be found in literature, looking at the origin of travellers or their destination.¹⁰ The UN Tourism has a complex but comprehensive categorisation of tourism derived from the destination and purpose of the trip.

Figure 1. Types of tourism according to destination and purpose of the trip



Source: CASE own elaboration, based on UN Tourism (2019). UN Tourism Definitions.

The EU’s tourism ecosystem is highly diverse and complex, covering globalised and interconnected value chains. For many years now Europe has been the world’s leading tourism destination and has benefitted from new jobs, additional income,

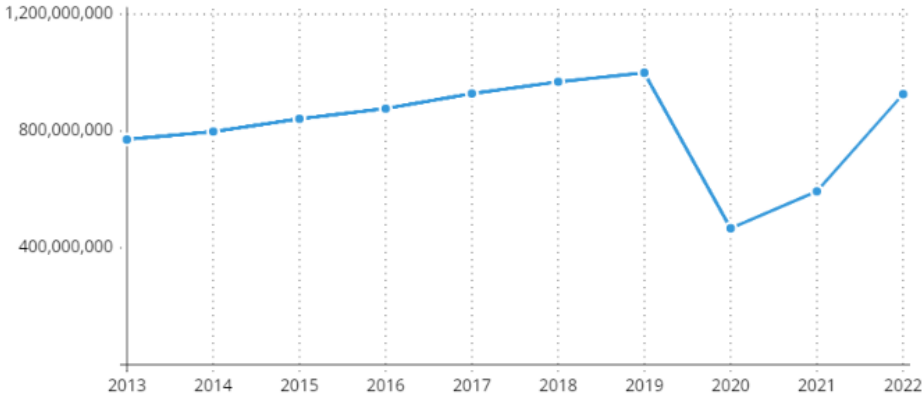
⁹ UN Tourism (n.d.). *Glossary of tourism terms*.

¹⁰ Ibidem.

and other opportunities that tourism brings.¹¹ While European tourism recorded serious losses during the COVID-19 pandemic, with 51 million fewer Europeans travelling for personal purposes in 2020,¹² current data (up to 2022) confirms that the sector has already completely recovered, reaching the pre-pandemic levels of tourism trips (Figure 2). Such a rapid recovery only confirms the resilience of the tourism sector, and the fact that travel is a part of the European way of life.

Out of 3.2 million tourism businesses in 2019, 99.8% were micro, or small and medium enterprises (SMEs).¹³ This means that small companies, often family holdings, are the backbone of the sector. That gives it authenticity and uniqueness, but at the same time may be a barrier to growth, due to limited resources available for training and adaptation measures.

Figure 2. Arrivals at tourist accommodation establishments in EU Member States (2013-2022).



Source: CASE own elaboration, based on Arrivals at tourist accommodation establishments in EU Member States (Eurostat database).

In 2019, the last year before the COVID-19 pandemic, the gross value added directly generated by tourism amounted to an estimated €572 billion, or 5% of the total gross value added in the EU economy.¹⁴ At that time tourism-related activities employed over 12.5 million people, comprising more than 22% of

¹¹ Parliamentary Assembly (2002). *Tapping Europe’s tourism potential.*

¹² *Share of the EU population (aged 15 and over) participating in personal trips* (Eurostat database).

¹³ *Structural business statistics* (Eurostat database).

¹⁴ Eurostat (2023). *Tourism: €572 billion gross value added in the EU.*

people employed in the services sector and nearly 10% of people employed in the non-financial business economy.^{15 16}

Looking at the first data on post-COVID employment in tourism, the industry has evidently been rebuilding itself since the pandemic, and the EU saw the recovery period as a new opening for creating more resilient, green and digital tourism.¹⁷ With EU tourism reaching a decade high in the first half of 2023¹⁸ it represents an important economic and developmental opportunity.

Changes in consumer behaviour observed during the pandemic, namely preferences for travel closer to home, longer stays and higher spending, responsible travel and the emergence of nature and rural tourism,¹⁹ are having a significant impact on post-pandemic travelling patterns. These new trends in tourism can already be backed up by data. For example, 82% of Europeans are ready to change at least some of their travel habits to be more sustainable, while 48% want their trip to involve less waste. According to the European Travel Commission (ETC), travel demand, accommodation and activities offered will evolve markedly over the coming years to react to consumer expectations concerning the carbon footprint of the tourism sector.²⁰

On top of that, more than half of EU citizens wish to consume locally sourced products when on holiday, 41% of them want to travel to less visited destinations, and 48% want to travel outside of the high tourist season.

The increased interest in domestic travel, largely seen as a lasting effect of the pandemic, is also seen in travellers' behaviour. In 2022 the number of nights spent by domestic guests in tourist accommodations exceeded the 2019 level,²¹ and in the first half of 2023 it increased by a further 5.8 percentage points.²²

Although the tourism industry was significantly impacted by the COVID-19 pandemic, **rural tourism**, offering accommodation in remote areas with a lower density of visitors, has been gaining more interest among tourists. This trend

¹⁵ Eurostat (2023). *Tourism industries – employment*.

¹⁶ EC (n.d.). *EU Tourism Dashboard*.

¹⁷ Council of the European Union (2022). *Council conclusions on 'European Agenda for Tourism 2030'*.

¹⁸ Eurostat (2023). *EU tourism at a decade high in the first half of 2023*.

¹⁹ WTO (2023). *International Tourism Highlights, 2023 Edition – The Impact of COVID-19 on Tourism (2020–2022)*.

²⁰ ETC (2022). *Restarting Tourism for the Better: Performance of European Tourism Before, During & After COVID*.

²¹ Eurostat (2023). *EU tourism nights recover to 95% of 2019 level*.

²² Eurostat (2023). *EU tourism at a decade high in the first half of 2023*.

continues in the post-pandemic period (with domestic travel gaining popularity).²³

24 25

Rural tourism – complementing other economic activities and contributing to GDP and job creation, while also having the capacity to spread out demand throughout the year (thus combating seasonality) and across wider areas – constitutes considerable potential for stimulating local economic growth and social change.²⁶ The stimulating potential of rural tourism is especially important considering that most rural areas are among the most vulnerable regions in the EU, with GDP per head generally lower in rural and intermediate regions than in urban regions.²⁷

However, structural challenges such as weaker transport infrastructure, under-developed digital connectivity, lower quality public services, or growing skills shortages and the related youth brain drain may complicate tapping into rural tourism potential.

Several EU policies support rural areas and can be used to address these challenges: the Common Agricultural Policy (CAP), regional, cohesion and social policies, and a number of other EU policies related to energy, transport, connectivity, employment, environment and the climate. In June 2021, the European Commission published a communication setting out a long-term vision for the EU's rural areas (LTVRA) up to 2040. One of the policy areas within the LTVRA that is seen as an opportunity to strengthen the socio-economic fabric in rural areas, particularly through job creation, is tourism.

Despite the increased interest in the rural tourism following the pandemic, it is worth noting that rural or farm-based tourism activities have a long tradition in Europe. The Alpine regions, Tatra mountains, Mediterranean parts of Europe and

²³ UN Tourism (2023). *International Tourism Highlights, 2023 Edition*.

²⁴ Tourism Economics (2021). *Rural destinations fare better as consumer preferences shift*.

²⁵ Marques Santos A. et al. (2020). *Behavioural changes in tourism in times of Covid-19*.

²⁶ EC (2021). *Commission Staff Working Document Accompanying The Document Communication From The Commission To The European Parliament, The Council, The European Economic And Social Committee And The Committee Of The Regions A Long-Term Vision For The EU's Rural Areas – Towards Stronger, Connected, Resilient And Prosperous Rural Areas By 2040*.

²⁷ EC (2021). *Communication From The Commission to The European Parliament, The Council, The European Economic And Social Committee And The Committee of The Regions A Long-Term Vision For The EU's Rural Areas – Towards Stronger, Connected, Resilient and Prosperous Rural Areas By 2040*.

Lake Balaton have a long record of the presence of such tourism activities, which are now also spreading around the rural areas of the EU.²⁸

Nowadays, rural tourism can be understood as a broader term than agritourism or farm tourism, being a diversification of the rural economy that provides opportunities for expanding diversified rural economic activities, generating income from urban areas and from abroad, and maintaining the service base in the region.²⁹

According to UN Tourism, **rural tourism is "a type of tourism activity in which the visitor's experience is related to a wide range of products generally linked to nature-based activities, agriculture, rural lifestyle/culture, angling, and sightseeing"**.³⁰ The activities connected to rural tourism take place in non-urban (rural and predominantly rural) areas with the following characteristics: (1) low population density, (2) landscape and land-use dominated by agriculture and forestry and (3) traditional social structure and lifestyle".³¹

2.2. An overview of rural tourism activities in the EU

Tourism can be seen key economic, cultural and social activity, contributing to growth and employment in the EU, its Member States and their regions and cities. For example, tourism is one of the cornerstones of the Spanish economy and an outstanding driver of economic and social development. In 2017 it accounted for 11.8% of GDP and in 2018 sustained 13.5% of employment (or 2.6 million direct jobs).³² In the region of Andalusia, tourism is the second most important industry within the economy, accounting for 13% of the regional GDP.³³

Rural areas have for many years enjoyed considerable popularity among tourists in the EU (Figure 3). Although rural tourism fell significantly with the COVID-19 pandemic, it regained its popularity quite quickly³⁴.

²⁸ Bojnec Š. (2010). *Rural Tourism, Rural Economy Diversification, and Sustainable Development*.

²⁹ *Ibidem*.

³⁰ WTO (2019). *UN Tourism Tourism Definitions*.

³¹ *Ibidem*.

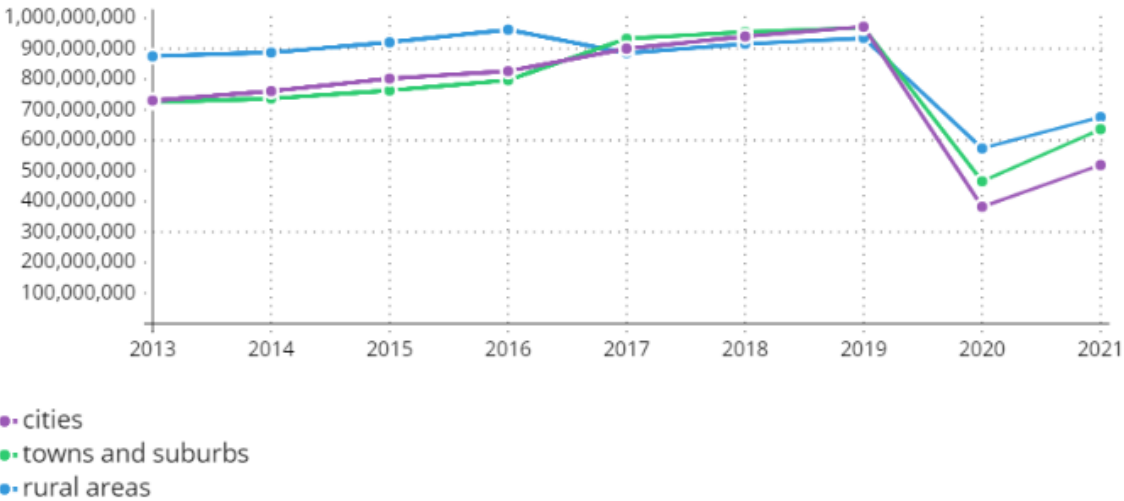
³² OECD (2020). *Tourism Trends and Policies 2020*.

³³ Invesiticia Andalusia (n.d.).

³⁴ UN Tourism (2023). *International Tourism Highlights, 2023 Edition*.

Moreover, up to 2016 the number of nights spent at tourist accommodation in rural areas surpassed the number of stays in cities, as well as in towns and suburbs. As data in the figure below shows, the impact of COVID-19, although visible by the drop in the number of visitors, was less significant than in urban areas. Rural areas seem to be recovering quicker, attracting higher numbers of visitors (also in the post-pandemic period), proving the resilience of the rural tourism sector.

Figure 3. Nights spent at tourist accommodation by degree of urbanisation (2013–2021), EU Member States

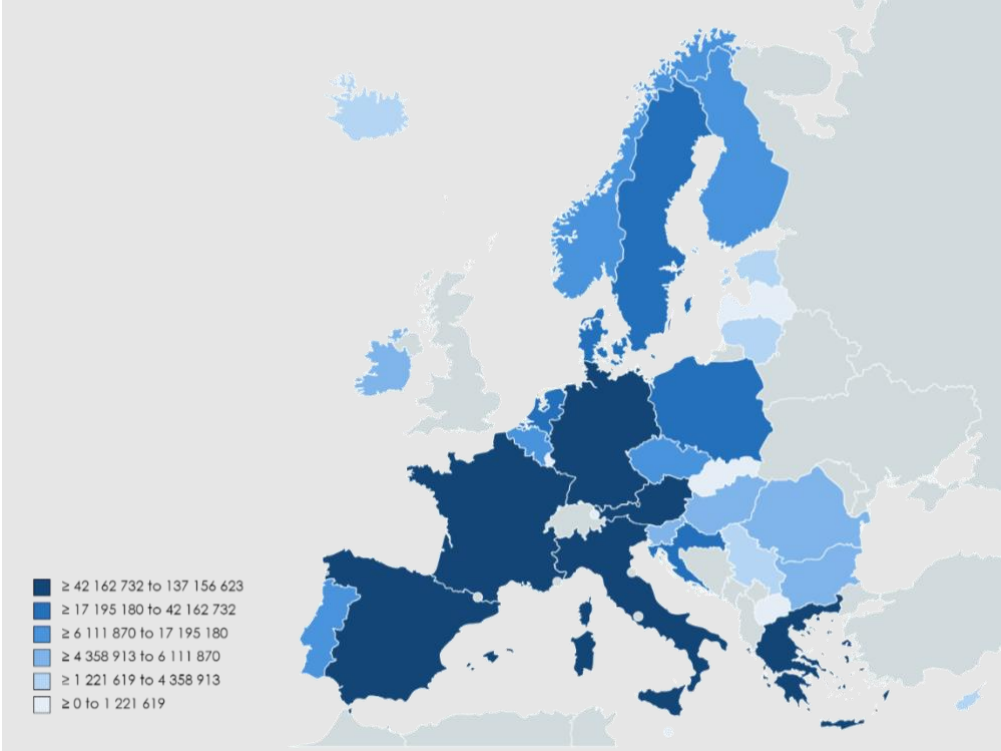


Source: CASE own elaboration, based on Nights spent at tourist accommodation by degree of urbanisation in EU Member States (Eurostat database).

Tourism levels also vary across EU Member States. The number of nights spent at tourist accommodation in rural areas (according to the most recent data from 2021) is highest in France, Germany, Italy, Greece, Austria and Spain. In contrast, lower levels of nights spent in rural areas are noted in Malta, Luxembourg, Slovakia, the Baltic States (Latvia, Estonia, Lithuania), but also in Iceland, Serbia and Cyprus.³⁵

³⁵ Nights spent at tourist accommodation by degree of urbanisation in EU Member States (Eurostat database).

Figure 4. Nights spent at tourist accommodation establishments in rural areas (2021) in the EU Member States



Source: CASE own elaboration, based on Nights spent at tourist accommodation by degree of urbanisation in EU Member States (Eurostat database).

When analysing the data, one has to bear in mind that rural tourism activities might be somewhat underestimated. Many farm accommodation enterprises are financially integrated into the agricultural activities of the farm, with profits from accommodation set off against possible losses on the farm. An accurate assessment of job numbers also poses difficulties – as many inhabitants of rural areas work in multiple jobs, sometimes in different sectors.³⁶ As a result, the real share of rural tourism in the rural regions might be slightly underestimated.

According to the Commission, rural tourism activities are gaining in attractiveness, with new preferences for low-density, remote destinations and an increase in more sustainable and eco-inclusive consumer behaviour, especially among younger generations.³⁷ This trend is prevalent all around the world. As the UN Tourism study has shown, all countries across the 78 surveyed expect rural tourism to grow in importance: 95% of responses from the 19 EU Member States

³⁶ EP (2013). *Industrial Heritage and Agri/Rural Tourism in Europe*.

³⁷ EC (2021). *Tourism capacity, expenditure and seasonality in Europe by urban-rural typology and remoteness*.

estimated the prospects for rural tourism as “much better than now” or “better than now”.³⁸

2.3. Challenges and opportunities of rural tourism in the EU

Despite the potential of rural tourism, there are significant regional gaps in economic, infrastructural and social development that could hinder its growth. A lot of non-urban areas in the EU are experiencing demographic decline, lower income, poorer access to public infrastructure and connectivity, as well as limited vocational education and training (VET) opportunities, which could delay the digital and green transition. The challenges that might adversely affect tourism as a means of rural development are categorised into 7 groups in the figure below.

Figure 5. Categorisation of challenges related to rural tourism



Source: CASE own elaboration, based on UN Tourism (2023). *Tourism and Rural Development: A Policy Perspective*.

Infrastructure, population and the economy, coupled with governance and financial mechanisms, are identified as the most pressing issues for rural tourism development. The UN Tourism representative highlighted that infrastructure-related challenges are ranked the highest, with deficiencies in road, ports, airports

³⁸ UN Tourism (2023). *Tourism and Rural Development: A Policy Perspective*.

and other infrastructure hindering access to rural areas³⁹. These deficiencies make it more difficult for tourists to reach their destination.

The stakeholders engaged in agritourism interviewed for the study confirmed that without well-developed connections between urban and rural regions, enabling the easy movement of tourists, their expectations of social and environmental responsibility are not met. Such a situation might decrease rural regions' appeal to tourists, while also causing discontent in local communities.

One of the responses of the LVTRA in supporting rural tourism is to improve the transport infrastructure,⁴⁰ especially since as many as 44% of rural residents point to it as a main need that should be addressed.⁴¹

Problems with digital connectivity are also seen as an important obstacle to the development of rural tourism.⁴² The gap between regions remains significant to this day, with 60% of EU rural households having high-speed internet access, compared to the EU's overall average of 86%. During the LTVRA consultations, 93% of the respondents strongly believed that over the next 20 years the attractiveness of rural areas would depend significantly on the availability of digital connectivity.⁴³ The study's interviewees also expressed their concerns regarding the need for better digitalisation. Due to gaps in connectivity and digital skills, rural stakeholders might not be ready to fully seize the potential of the upcoming new technologies, such as digital marketing, online booking platforms, smart tourism solutions, and AI tools.

Today, an online presence is a must, since online booking channels are the most popular means of organising trips among Europeans.⁴⁴ However, only 46% of the rural population have at least basic digital skills.⁴⁵ Supporting proper human resources through upskilling is an indispensable need for tourism growth. During the interviews, rural tourism trade organisations added that the lack of appropriate

³⁹ Interviewee no.8

⁴⁰ EC (2021). *Commission Staff Working Document Accompanying The Document Communication From The Commission To The European Parliament, The Council, The European Economic And Social Committee And The Committee Of The Regions A Long-Term Vision For The EU's Rural Areas – Towards Stronger, Connected, Resilient And Prosperous Rural Areas By 2040.*

⁴¹ Eurobarometer (2021). *A long term vision for EU rural areas.*

⁴² Interviewees 1 & 2.

⁴³ EC (2021). *Connectivity: key to revitalising rural areas.*

⁴⁴ Eurobarometer (2021). *Attitudes of Europeans towards tourism.*

⁴⁵ EC (2022). *Education and Training Monitor 2022.*

human resources and training is a serious obstacle limiting rural tourism development.⁴⁶

Another common challenge found by UN Tourism and confirmed by the interviewees is the shortage of tourist offerings such as local attractions,⁴⁷ or the limited availability of restaurants or other options for eating out.⁴⁸ Additional obstacles, noticed by the stakeholders, stem from limited entrepreneurial and management skills and the lack of collaboration between businesses. This hinders the integration of rural value chains in tourism that could maximise economic benefits and create synergies between the various goods, products and services of the local economy.

Tourism requires consideration of the impact of climate change and the surrounding natural resources and environment when developing destinations. Climate change mitigation and adaptation measures should always be part of the smart and sustainable tourism strategies at national, regional, and local levels.⁴⁹ Apart from sustainability principles, climate is considered an important factor influencing tourism demand (affecting the choice of tourist destinations, activities and seasonality).

At the same time, despite many identified challenges, all the interviewed stakeholders confirmed the huge potential of tourism development for the prosperity of rural regions. They see it as a unique way of supporting the revitalisation of rural communities in the long term – to promote sustainable and inclusive growth.⁵⁰ Tourism activities also have great potential in valorising natural and cultural resources, as well as engaging the local community in the development of tourist services and adding value to local products.⁵¹ A categorisation of opportunities related to rural tourism is presented in the figure below.

⁴⁶ Interviewees 1 & 2.

⁴⁷ Interviewee 6.

⁴⁸ Interviewee 6.

⁴⁹ EC (2023). *Regional Impact of Climate Change on European Tourism Demand*.

⁵⁰ UN Tourism (2020). *2020 Year of Tourism and Rural Development*.

⁵¹ Interviewee 5.

Figure 6. Categories of opportunities related to rural tourism



Source: CASE own elaboration, based on UN Tourism (2023). Tourism and Rural Development: A Policy Perspective.

As confirmed, in many cases the challenges are related to the general vulnerabilities, such as the need for better infrastructure development, stagnating economy and depopulation. Tourism can generate new jobs, reduce poverty, contribute to gender equality and increase region’s attractiveness.

Rural tourism can also help with the protection and promotion of cultural and natural resources. As remarked on by a representative of a local tourist organisation in Poland,⁵² the growing market for local products can spark interest in reviving forgotten traditions and finding new ways to commemorate local historical events. This may help promote local products grounded in local tradition, and lead to recognition for their unique composition, texture, taste or manufacturing technique.

Indeed, the EU has supported such activities and products through its policy on geographical indications and quality schemes, which establishes intellectual property rights not only for the name of a product, but also for its composition or means of production.⁵³

⁵² Interviewee 3.

⁵³ European Commission (n.d.). *Geographical indications and quality schemes explained.*

Moreover, rural tourism has the ability to empower local communities and strengthen ties between the inhabitants. A representative of a local tourist organisation in Poland⁵⁴ described how local residents help each other with the growth of businesses by offering customers products from their local community. The diversification of products among local enterprises means that while a vineyard produces wine and receives visitors, some nearby farm may add local cheeses or hams. Communal activities may also provide an opportunity to empower vulnerable groups. One such example could be country housewives' associations (Koła Gospodyń Wiejskich), which have a long tradition of operating in Poland and uniting women who engage in upholding local culture.⁵⁵ These associations, which are often involved in agritourism, offer insights into local activities, as well as a social circle with a platform representing local women's interests.

Rural areas can also serve as resilient destinations during times of crisis, as they offer isolation and opportunities for leisure away from large population centres.⁵⁶

2.4. Possible negative impact of tourism in rural areas

Tourism, regardless of its enormous advantages, can also be a source of negative externalities for local communities, the economy and the environment. The existing literature suggests that intensified tourism might negatively affect cultural identity or bring about change in regional fauna and flora. It might also hamper access to public services, or local people's access to properties. Such effects can have a particular impact in regions with significantly underdeveloped infrastructure, connectivity, or public transport.

We identify three types of negative externalities that might be detrimental to the local environment, local economy, or the local society and culture.

Environmental impacts

Poorly planned tourism development can have an adverse impact on the natural environment in rural areas.⁵⁷ Its protection is an important priority for the EU's

⁵⁴ Interviewee 3.

⁵⁵ Olejniczak (2021). *Kierunki aktywności kół gospodyń wiejskich*.

⁵⁶ Interviewee 8.

⁵⁷ EC (n.d.). *Tourism capacity, expenditure and seasonality in Europe by urban-rural typology and remoteness*.

citizens, 65% of whom consider the destruction of natural habitats or the loss of animals or plant species “an immediate and urgent problem”.⁵⁸

As stated by a representative of a Polish local tourist organisation,⁵⁹ the presence of tourists – meaning an increased number of people exploiting the resources of an area – has to be taken into account, for example when planning waste management services.⁶⁰ A good example of managing this issue can be seen in the island of Sardinia, serving as a model for Zero Waste thanks to their recycling efforts and local initiatives – implementing a door-to-door separate collection system where the municipalities themselves are held accountable and are either punished or rewarded for the amount of waste they produce.

This is at the forefront of the EC’s actions. According to the Nature Restoration Law, the new goal is to restore at least 20% of EU land and sea by 2030, and all ecosystems in need of restoration by 2050.

In this case, the objective is to limit potential negative externalities from tourism, such as environmental degradation – for example by controlling private transport and promoting green public transport, which, as mentioned earlier, is at this point largely unavailable.

Negative externalities – among which we include changes in the composition of flora and fauna such as the destruction of habitats, the killing of animals, and the destruction of valuable species for plant collection and wood exploitation, and others – should be considered early on and appropriate action should be planned in advance.

The increased pollution caused by the limited capacity of public services supporting waste management and sewage treatment, with the increased number of people in the region, might lead to water pollution, waste pollution, and local discontent. Air pollution may also be more apparent, and likewise the noise pollution caused by the increase in traffic and tourist activities.

Other negative externalities are related to the potential usage of the natural resources by rural tourism and the increased activities of tourism stakeholders (businesses and tourists). They include:

⁵⁸ EC (2021). *Attitudes of Europeans towards tourism*.

⁵⁹ Interviewee 3.

⁶⁰ Zero Waste Europe (n.d.). *Sardinia demonstrates that islands can achieve zero waste*.

- littoralisation – the concentration of economic activity in coastal areas, which can be heightened through the development of tourism;
- higher use of fossil fuel resources for energy usage (including reliance on air conditioning during summer in island areas);
- soil erosion, due to the increased soil exposure;
- damages to river banks and rivers;
- decrease in water resources (in some cases leaving the local population with a limited water supply);
- and an inferior visual impression.

Economic impacts

As much as tourism may have a tremendously positive impact on the local economy (as with the case of the Andalusia region presented in the following chapter), it may also have a negative impact on local economic life.

The increased demand for food and services, as well as new investments in land and housing may produce a direct increase in property and commodity prices. In addition, the increase in demand for products that cannot be locally met may result in the import of products from elsewhere and, in consequence, economic leakage.⁶¹ Such leakage occurs when money leaves the region's local economy due to the fact that a local consumer has purchased a product or service from a supplier located outside the region.

There can also be negative consequences of investing in tourism, since tourist infrastructure often generates high costs and requires not only construction but also maintenance, especially since it is used by large groups of people. Like any other sector, tourism requires funds, which could potentially be allocated elsewhere.

In regions receiving large numbers of tourists, there is often big demand for real estate to cater for the tourism industry, including for workers in tourism. This leads to rising property prices, which is good for the property owners but can be problematic for locals wanting to purchase a property. Online short-term rental (STRs) platforms such as Airbnb have grown spectacularly over recent years, strongly impacting the affordability of housing in tourist destinations. For

⁶¹ C. Frent (2016). *An overview on the negative impacts of tourism*.

example in Portugal, on average a 1 percentage point increase in a municipality's Airbnb share results in a 3.7% increase in house prices.⁶² Moreover, the use of land for summer houses in rural areas may lead to land sub-utilisation or limit housing opportunities for locals.⁶³

Concentrating all economic activities around tourism can evidently have dire consequences. Tourism relies heavily on the visitors' preferences, and can be influenced by factors impossible for the owners of rural businesses to control. A representative of a local tourist organisation in Poland⁶⁴ highlighted such factors as the war in Ukraine or the COVID-19 pandemic as possibly having a large impact on tourism, their effects often both unpredictable and unavoidable from the business owners' perspective. Similarly, southern European travel destinations (including Greece and its island of Rhodes) may lose their appeal in the long run due to heat and wildfires.

Furthermore, tourism is highly seasonal, and this can only be catered for to a certain extent. As representatives of rural tourism trade organisations mentioned,⁶⁵ many activities, such as kayaking or skiing, are strictly seasonal. In the most frequented tourist region in the EU (at NUTS level 2) – Jadranska Hrvatska in Croatia – the two busiest months of the year accounted for 68.7% of total nights spent there.⁶⁶ However, some countries and regions have managed to partially combat tourism seasonality – like some mountainous areas, which have two peak tourist seasons (summer and winter).

Unfortunately, some forms of tourist activity also limit the extent to which local communities can benefit from their presence. One example, mentioned by the representatives of rural tourism trade organisations,⁶⁷ is that of cruises, during which the tourists can visit even remote coastal regions, but eat and sleep on their ship, thereby not contributing to the local economy. In view of such cases, it is crucial to ensure that travellers actually spend their money in the places they visit.

Tourism can also constitute a threat to local forms of governance if it becomes a dominant economic force. This situation can lead to shifts in power dynamics, and have an impact on traditional decision-making processes. Local leaders and

⁶² Franco S. et. al. (2021). *The impact of Airbnb on residential property values and rents: Evidence from Portugal*.

⁶³ Interviewee 8.

⁶⁴ Interviewee 3.

⁶⁵ Interviewees 1 & 2.

⁶⁶ Eurostat (2022). *Tourism statistics at regional level*.

⁶⁷ Interviewees 1 & 2.

institutions may prioritise the interests of the tourism industry over those of the broader community, potentially changing traditional governance structures. Shifts in traditional economic sources related to rural value chains can occur when tourism becomes the leading economic force. Reducing the diversity of economic possibilities in rural communities might increase their risk to external factors.⁶⁸

Socio-cultural impacts

The socio-cultural impacts concern the ways in which tourism is contributing to changes in value systems, individual behaviour, family relationships, collective lifestyles, moral conduct, creative expression, traditional ceremonies and community organisation at a tourist destination.⁶⁹

Tourism can provide some improvements and changes in quality of life, the social structure and social organisation of local society, family relationships and lifestyles, or even improve education in the region, develop a tolerant environment, drive progress in women's rights, improve leisure-time activities and recreational benefits, develop awareness of historical and cultural values, lead to foreign language learning, create new professions and bring about the emergence of new social institutions.⁷⁰

However, poorly planned tourism can mean that villages are invaded by visitors (both international and national) with different values, disrupting rural culture and changing the size of the host population and its demographic structure and lifestyles.⁷¹ Without the proper management plans and tools in place, increased visitor numbers can pose threats to rural heritage. As emerging destinations, rural areas may face an increase in visitors before being able to respond with proper management mechanisms.⁷²

Social and cultural differences that can arise between tourists and the resident population may lead to conflicts between these two groups and inside the host communities, or create social problems⁷³ – such as overcrowding of rural areas, traffic congestion, or even rising crime.

⁶⁸ Interviewee 8.

⁶⁹ Pizam A., Milman A. (1984). *The Social Impacts of Tourism*.

⁷⁰ Akova O., Atsiz O. (2019). *Sociocultural impacts of tourism development on heritage sites*.

⁷¹ Ibidem.

⁷² Interviewee 8.

⁷³ C. Frent (2016). *An overview on the negative impacts of tourism*.

The ratio between the number of local residents and the number of holiday home owners and tourists is important for the way a local community receives tourists. A higher share of holiday home owners, especially seasonal, can lead to depopulation and in consequence a decrease in public services outside the season. The stakeholders active in rural tourism development confirmed that this might be a problem in many rural areas, highlighting that there is a need for a destination management tool that would help business owners and local authorities monitor the tourist flow. It is natural that some places are more popular than others, and that some struggle with what is termed “overtourism”. A classic example of overtourism is Hallstatt in Austria – visibly missing a management solution like fixed maximum contingents.⁷⁴

Establishing proper management measures and promoting responsible tourism practices is necessary for the planning of sustainable tourism that takes cultural and environmental preservation into account alongside the well-being of the community. The use of data to properly monitor rural destinations’ status could provide early alerts on threats and negative impacts, while also providing insights to measure the impact of positive actions.⁷⁵ Evidence-based spaces for communication are also important. In another example from the mountain region in Austria, bikers did not respect the official routes, and it was believed that the negative environmental impact was caused by incoming tourists. After analysing the situation with data from the mobile phones, it turned out that 80% of violators were locals. To prevent misunderstandings, it is important to look at the evidence gathered with data.⁷⁶

In this respect, Destination Management Organisations (DMOs), built on public-private partnerships, could play a crucial role not only in strengthening the role of tourism, but also in optimising specific destinations. DMOs can influence the way tourism is developed – ideally switching from “mass”, volume-focused tourism to sustainable “quality tourism”, attracting selected visitors (who wish to stay for longer, entailing higher spending) through targeted campaigns. The creation of such partnership is supported by the EC, as in the case of Romania (which lacked

⁷⁴ Interviewee 7.

⁷⁵ Interviewee 8.

⁷⁶ Interviewee 7.

a coordinated system of tourism destination management, and where regional stakeholders had limited capacity for implementing a coordinated network⁷⁷).

When it comes to loss of cultural identity, as asserted by the representatives of rural tourism trade organisations,⁷⁸ the most pressing concern in the EU is cultural unification centred around content accessed via the internet or TV channels. Notwithstanding, it is important to remember that the development of rural areas should not rely solely on tourism, since destinations considered primarily tourist attractions may lose their appeal of “authentic” countryside.

⁷⁷ EC (n.d.) Developing tourism destination management organisations in Romania.

⁷⁸ Interviewees 1 & 2.

3. Analysis of the relationship between the LTVRA and tourism, and assessment of funding

The economic significance of the tourist sector has been recognised across a broad spectrum of European policies and strategies. Mentioned for the first time in the Treaty on the Functioning of the European Union in 1957, it has been gaining momentum in the last 20 years due to increased globalisation, ease of transport, increasing personal wealth and new directions in tourism.

The Lisbon Treaty of 2007 acknowledged the importance of tourism – outlining a specific competence for the EU in this field, and allowing for decisions to be taken by a qualified majority. An article within the Treaty specifies that the EU ‘*shall complement the action of the Member States in the tourism sector, in particular by promoting the competitiveness of Union undertakings in that sector*’. In 2010 the Communication “*Europe, the world’s No 1 tourist destination – a new political framework for tourism in Europe*” adopted in the aftermath of the financial crisis and the volcano eruption in Iceland, the EU sought to relaunch tourism activities, combat seasonality and maintain leadership in terms of tourism arrivals.⁷⁹

Since then, many sectoral, industrial, national and regional strategies have introduced approaches to tourism development as part of their strategy supporting cohesion, diversification and growth.

The Long-Term Vision of Rural Agriculture (LTVRA) created by the rural communities is one of them, where a portion of the activities focus on the support of rural development through rural tourism.

This part of the report analyses the relationship between LTVRA and tourism in different EU policies and strategies. It shows that since different policies were created at different points in time, as responses to sectoral and regional challenges, the LTVRA can only loosely be related to tourism through multiple channels. Regardless, this chapter also aims to show that LTVRA stakeholders on the regional and local level can efficiently benefit from already existing strategies in their efforts towards promoting the development of rural tourism.

⁷⁹ Ibidem.

3.1. The relationship between LTVRA and tourism

The Long-Term Vision for the EU's Rural Areas (LTVRA) up to 2040 is a strategy announced by the European Commission in June 2021, with the aim of targeting rural challenges. The LTVRA was based on a broad consultation including rural communities, farmers, businesses, Local Action Groups (LAG) and other relevant stakeholders, as part of the European Network for Rural Development (ENRD). Public consultations and local events enabled the gathering of their views and opinions. Taking all these perspectives into account, a Rural Pact and Rural Action Plan were set up.⁸⁰

The objective of the Rural Pact is to facilitate collaboration, networking, and mutual learning.⁸¹ Actors who join the pact can contribute to making rural areas more attractive spaces through harmonious territorial development. Engagement and the exchanging of ideas are seen as vital for innovation, which contributes to the creation of economic opportunities, including in tourism.⁸²

The EU Rural Action Plan, on the other hand, covers activities organised in four pillars to make non-urban regions stronger, more resilient, connected and prosperous. The plan aims to foster territorial cohesion while creating new opportunities to boost entrepreneurship, attract innovative businesses, assure access to high level employment, ameliorate skills, enhance public services and infrastructure, and campaign in favour of sustainable agriculture and diversified economic activities.⁸³

The importance of tourist activities in non-urban areas, and their potential to contribute to employment and labour market diversification, is emphasised in the LTVRA. In the case of the Rural Pact, market diversification – which can include rural tourism – is highlighted, although tourism only appears there indirectly.

The Rural Action Plan outlines significant synergies between on-farm activities, the production of local quality products, the adequate management of landscapes, and sea-land interactions in coastal rural areas that can be used to attract tourism.⁸⁴

⁸⁰ EC (2021). *Long-term vision for rural areas: for stronger, connected, resilient, prosperous EU rural areas.*

⁸¹ EU Rural Pact Platform (n.d.). *Learn more about the Pact.*

⁸² EU Rural Pact (n.d.). *Become a member of the Rural Pact.*

⁸³ EU Rural Vision (n.d.). *Action Plan.*

⁸⁴ EC (2021). *Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions A long-term Vision for the EU's Rural Areas – Towards stronger, connected, resilient and prosperous rural areas by 2040.*

The LTVRA includes several flagship projects that will be supported with public, private and EU funds, among them the European Agriculture Fund for Rural Development (EAFRD), European Regional and Development Fund (ERDF) and Cohesion Fund (CF), European Social Fund Plus (ESF+), European Maritime Fisheries and Aquaculture Fund (EMFAF), as well as the NextGenerationEU through the Resilience and Recovery Facility (RRF), and the Just Transition Fund (JTF).⁸⁵ These flagship projects are adopted by local action groups (LAGs), who prepare their local development strategies and apply for funding. These opportunities are open to projects promoting rural tourism.

The representatives of rural tourism trade associations interviewed for this report fully agree that rural tourism will become a solid pillar of rural development policy at the EU level, as tourism will be seen as an opportunity to strengthen and diversify local economies.

In the case of farms, such tourism can function as an opportunity to secure a second income and as a platform of exchange between city and countryside, fostering cohesion.⁸⁶ Nevertheless, from their perspective the LTVRA reflects rural development too generically, without taking into consideration the societal circumstances and preferences of people living and working in rural areas. Instead, more emphasis is put on farming interests and growth. Also, the UN Tourism representative highlighted that tourism could be more strongly integrated into the LTVRA by providing broader evidence of the policies, examples, and positive impact that it could bring to rural areas' development.

We might conclude that the LTVRA is loosely related to EU policies addressing the tourism ecosystem in general, since it was created only in 2021. Nevertheless, regional and local authorities can build on it by reaching for more concrete measures from existing programmes and solutions, since these programmes provide direct and indirect support for rural regions in combatting their structural challenges.

EU tourism policy landscape

The recently adopted EU policies in the field of tourism (and beyond) aim to keep Europe a leading global destination while enabling green and digital

⁸⁵ EU Rural Vision (n.d.). *Toolkit on EU funds for rural areas*.

⁸⁶ Interviewee 6.

transformations.⁸⁷ The tourism ecosystem, which was one of the sectors hit hardest by the COVID-19 pandemic, was the first industry to be supported by the European authorities.

Through the updated EU industrial strategy (2020), the EC initiated a co-creation process for tourism, which resulted in the publication of the Transition Pathway for Tourism in February 2022, and the adoption of the European Agenda for Tourism 2030 in December 2022 by the Council of the European Union. Both documents prioritise green and digital transition, focusing on sustainability as a core of the new tourism policy. Sustainability is being addressed through fair measures supporting and controlling short-term rentals, encouraging multimodal travelling, introducing circularity in tourism services, and the usage of digital tools for online tourism services.

The Transition Pathway for Tourism (TPT) makes a broad reference to the LTVRA by acknowledging the importance of rural areas for European identity:⁸⁸ *“The support for rural tourism and non-urban areas via comprehensive smart and sustainable tourism strategies, using the comparative advantage, thoughtful market segmentation, diversification as well as the integration of well-being of residents of rural areas can be helpful in regional rural development”*.

In the TPT the EU encourages all Member States to help build cross-sectoral collaboration that contributes to the green transition of the tourism ecosystem in terms of the development of sustainable transport, with special attention to the increased needs of peripheral, less accessible regions.⁸⁹

Greener transport in tourism has been also highlighted and supported by the Sustainable and Smart Mobility Strategy and Action Plan from 2020.⁹⁰ One of the aims of the Strategy is to further measures for disadvantaged regions, such as rural and remote regions.

The EU Pact for Skills – Skills Partnership for the Tourism Ecosystems from December 2021⁹¹ can be a good source of knowledge and initiatives supporting up- and reskilling activities within rural areas for the development of rural

⁸⁷ EC (n.d.). *Overview of EU tourism policy*.

⁸⁸ EC (2022). *Transition Pathway for Tourism*.

⁸⁹ Council of the European Union (2022). *Council conclusions on ‘European Agenda for Tourism 2030*.

⁹⁰ EC (2020). *Communication from the Commission to the European Parliament, The Council, The European Economic and Social Committee and the Committee of the Regions - Sustainable and Smart Mobility Strategy – putting European transport on track for the future*.

⁹¹ EC (2021). *The EU Pact for Skills – Skills Partnership for the Tourism Ecosystem*.

tourism. While there is no direct reference to the LTVRA in the document, the Pact aims to mobilise resources to invest in skills and establish a shared collaboration model between sectoral actors to collectively help in the upskilling and reskilling of the workforce in the tourism industry. Local training providers and regional authorities are one of the type of organisations pledging to reskill their local communities. The Pact for Skills website gathers all stakeholders at the national, regional and rural levels to help respond to sectoral local upskilling needs.⁹²

Several other strategies and policies predating the LTVRA can also be of reference and used by local authorities for addressing the rural development challenges and supporting rural tourism.

For example, through the Communication on the Blue Growth opportunities for marine and maritime sustainable growth, the EC recognised that tourism is an additional source of income for some coastal communities, but in others it can dominate the local economy. It called for tailor-made approaches to be accompanied by measures that help to improve the tourism offer for low-season tourism and reduce the high carbon footprint and environmental impact of coastal tourism.⁹³

The updated European Bioeconomy Strategy⁹⁴ from 2018 presents five ambitious aims supporting bioeconomy development in Europe. One of the objectives aimed to strengthen European competitiveness and jobs creation opens up potential for diversifying income in rural areas and boosting rural economies through investment in skills and new local business models. While it does not directly answer the challenges related to rural tourism, it does clearly address the potential of bioeconomy development for rural growth, and responds directly to rural areas' challenges (such as the lack of infrastructure) and the LTVRA aims (for example the diversification of business models), indirectly allowing for the support of rural tourism as well.

⁹² EC (n.d.). *Pact for Skills*.

⁹³ EC (2014). *Communication from the Commission to the European Parliament, the Council, The European Economic and Social Committee and the Committee of the Regions A European Strategy for more Growth and Jobs in Coastal and Maritime Tourism*.

⁹⁴ EC (n.d.). *Bioeconomy Strategy – What is the Strategy about?*.

The EU Biodiversity Strategy for 2030⁹⁵ also provides direct support for the development of rural tourism at the regional level. The Strategy emphasises that by improving the diversity of agricultural systems, rural tourism, recreation and new business models will be created. Other initiatives, such as the restoration of freshwater ecosystems, restoration of the good environmental status of marine ecosystems and the reduction of pollution also support, directly or indirectly, the development of tourism in rural areas.

As shown here, while many policy strategies do not refer directly to the support of rural tourism or the LTVRA in general, they still can positively influence both. There are also other documents and programmes that can support the Vision and benefit rural tourism.

One of the examples is the newly launched Euro Cluster Rural Tourism (ERT) initiative within the COSME programme.⁹⁶ ERT is a Eurocluster created at the international level by professional organisations working on rural development. The idea behind the ERT initiative is to build a platform for the direct support of nano-, micro- and small enterprises in rural tourism⁹⁷ in order to establish a collaboration mechanism between clusters of regional tourism, to assist SMEs in reskilling and upskilling activities that are needed due to the digital and green transition, and to increase the visibility of rural tourism.⁹⁸ ERT also assists small rural tourism operators financially and in twelve focus areas including the topics of digital, sustainable, and social competences.⁹⁹

Another effective way to develop rural tourism can be found in macroeconomic interregional strategies that were implemented between 2009 and 2015 at the EU level. Initiatives undertaken there could build up the LTVRA by presenting more concrete actions supporting rural regions.

The EU Strategy for the Baltic Sea Region (EUSBSR), the first of the macro-regional strategies, was aimed, among others, to secure good transport conditions, helping connect people in the region, and helping climate change adaptation. Activities implemented within this Strategy, such as building transport

⁹⁵ EC (2020). *Communication from the Commission to the European Parliament, the Council, The European Economic and Social Committee and the Committee of the Regions EU Biodiversity Strategy for 2030 Bringing nature back into our lives.*

⁹⁶ EuroCluster Rural Tourism (n.d.).

⁹⁷ EuroCluster Rural Tourism (n.d.). *Project Information.*

⁹⁸ *Ibidem.*

⁹⁹ *Ibidem.*

infrastructure, or promotional and awareness-raising activities, helped citizens build new business models and strengthen the collaboration between them. The activities reinforced cohesion and could potentially have a positive impact on rural tourism.

The EU Strategy for the Danube Region (EUSDR), on the other hand, was aimed to promote, protect, and rehabilitate the cultural heritage of the Danube region, and to promote sustainable tourism in the area. By building strong collaborative activities among local and regional stakeholders, related to the improved waterway, rail-road-air mobility, protection of environmental and cultural heritage, knowledge society, increased competitiveness and several other issues, the programme indirectly strengthened local tourism stakeholders and service providers in the development of rural tourism.

Overall, regardless of the aims and activities being implemented, the Macroeconomic Strategies made the macro-regions, including the rural regions within them, more prosperous, helping them to foster social, economic, and territorial cohesion and giving them prospects for further development under the digital and environmental transition.

3.2. Actions supporting tourism in rural regions in the EU

As demonstrated above, despite the fact that the LTVRA is only loosely connected to tourism policies and strategies at the EU level, rural tourism development can to some extent be supported by existing actions and activities. The aim of this part of the report is to assess to what extent tourism has been supported in rural regions within LEADER and CLLD activities.

The LEADER programme and the Community-Led Local Development (CLLD) actions are European tools for regions designed to address challenges and problems using a bottom-up approach. With the idea of engaging local stakeholders and empowering them to contribute to regional development, Local Action Groups (LAG) partnerships were formed to bring together public, private, and civil sectors in the application of the local actions. By 2023, more than 2,500 LAGs had been established, covering more than 50% of the European rural population.¹⁰⁰

¹⁰⁰ ELARD (n.d.). *About LEADER and CLLD*.

While the LEADER programme was financed from European Agricultural Funds up to 2014, in the programming period of 2014–2020 it was extended under the broader terms of the CLLD by including the activities under multiple funds. The following Funds contributed on a larger or smaller scale to the development of rural regions in 2014–2020:

- the European Agricultural Fund for Rural Development (EAFRD)
- the European Regional Development Fund (ERDF)
- the European Social Fund (ESF)
- the European Maritime and Fisheries Fund (EMFF).¹⁰¹

With the success of the multi-funded CLLD, financial support for CLLD actions also remains extended for the 2021–2027 programming period.

Due to the fragmented nature of funds available for CLLD activities, identifying projects and activities supporting tourism in rural areas is a challenging exercise. Not only was the concept of rural tourism not directly addressed under the 2014–2020 programming period, but also tourism was not seen by the EC policy as an objective, but more as a sector to be supported.

As a consequence, the Cohesion Open Data Platform,¹⁰² which was used to analyse the objectives and actions of the CLLD/LEADER activities, does not include direct reference to tourism in rural areas. Despite this, there is a representative pool of projects which, while not being aimed at rural tourism, indirectly support tourism to a significant extent.

Therefore, the CLLD/LEADER framework has been split into two basic categories: the activities that directly addressed the challenges and opportunities of rural tourism plus the funds that were allocated to that (which for this study we define as direct support), and the other activities addressing the challenges of the rural regions, defined above, which might indirectly facilitate rural tourism in the longer term, but were not directly aimed at strengthening the tourism sector in rural regions; we define these as indirect support.

The key source for the evaluation of projects in direct or indirect support of rural tourism development will be the Cohesion Open Data Platform. It lists almost 2 million projects that have been conducted under selected EU funds, from 2014

¹⁰¹ European Network for Rural Development (n.d.). *LEADER/CLLD FAQs*.

¹⁰² EC (n.d.). *Cohesion open data platform*.

to this day. It is important to note that while the Data Platform contains a vast pool of projects, of the funds relevant for this study only the Cohesion Fund and European Regional Development Fund are included. This creates a challenge for the identification of projects that were funded by other funds identified previously in this chapter. Nevertheless, the available information provides some level of assessment of the use of actions related to tourism.

As stated above, the Cohesion Open Data Platform contains 1,919,784 projects in total.¹⁰³ Of these, the Cohesion Fund and the European Regional Development Fund account for 23,547 and 758,220 projects respectively, totalling 781,767 projects.¹⁰⁴ 4,012 projects (which is only about 0.5% of all projects) covered by these two funds are related to tourism, and of these 210 are tied directly to rural tourism.¹⁰⁵

The projects addressing tourism are diverse. Many were created to combat the negative impact of the COVID-19 pandemic on SMEs, or to support companies during that period.

There are projects supporting the promotion of local tourism, or enhancing the international competitiveness of tourism. Among these activities we can identify projects related to the promotion of tourism services, promotion of new local products, and the promotion of local heritage.

A limited number of available projects support the development of traditional transport infrastructure. There are projects addressing infrastructure related directly to tourism, but a large number of projects are also tied to infrastructure that is more relevant to the development of rural areas.

On the other hand, the projects related to tourism include activities that support the development of tourism infrastructure related to leisure, treatment and relaxation activities, or the creation of infrastructure for the production of local goods.

Some of those projects refer to the development of sustainable tourism through the creation of eco-innovative accommodation, or sustainable transport. For

¹⁰³ EC (2023). *Projects Co-Funded by the EU. Cohesion Open Data Platform.*

¹⁰⁴ Ibidem.

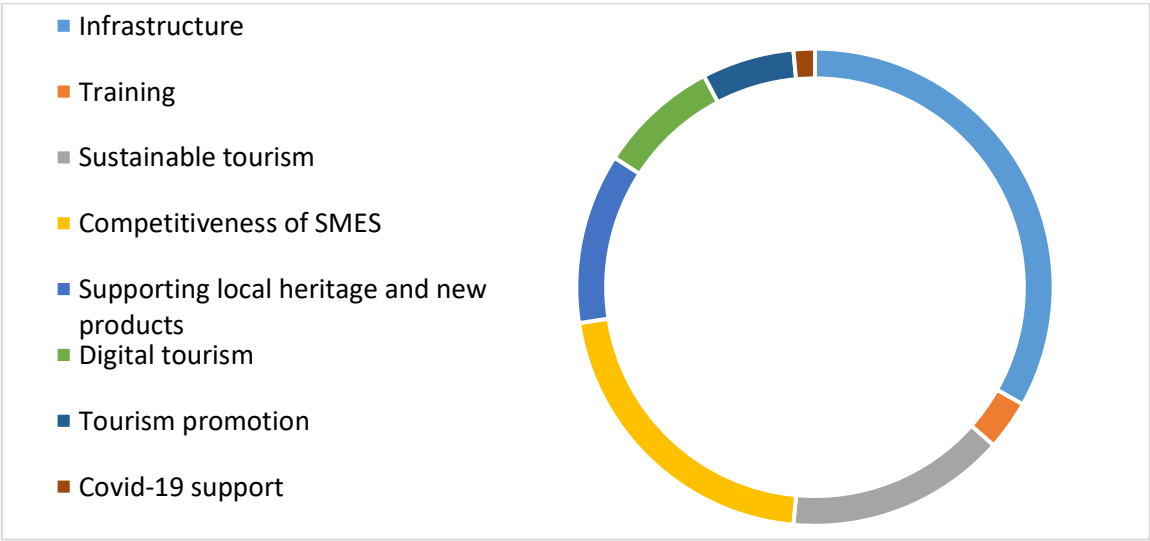
¹⁰⁵ Ibidem.

example, there are projects encouraging cycling-tourism destinations, the development of coastal-area sustainable tourism, and the fishing tourism business model in coastal territories. Many activities relate to new trends within tourism: increasing the appeal of cultural tourism, revitalisation of the infrastructure, or cultural heritage related to valorisation of the industrial cultural landscape through cultural tourism or to wine tourism and gastronomy.

The significance of digitalisation within tourism has also been well recognised in many of the projects through diverse initiatives. Some of them are related to the increase in digital tourism through e-tourism, the creation of special IT systems, or digital upskilling activities, and integrated digital tourism and culture ecosystems. On the other hand, there is a limited number of projects covering upskilling activities related to tourism. The majority of them are related to digital upskilling, and only a few refer to the competencies of lifelong knowledge for the hospitality and tourist sectors.

While only 210 projects are directly related to rural tourism, we were able to prepare a quantitative assessment of activities that the projects addressed. The aim here is to assess whether the activities being implemented correspond to the challenges, needs and opportunities listed in the report.

Figure 8. The share of activities in rural areas related to various challenges



Source: CASE own calculation based on the Cohesion Open Data Platform.

Over 30% of the activities identified as related to rural tourism supported the development of infrastructure in the region, the creation of new tourist accommodation, new rural tourism facilities, the renovation of old buildings for tourist purposes, or the creation of waste treatment plants.

Another 30% of the projects aimed to increase the competitiveness of SMEs working in rural tourism, supporting rural tourism stakeholders, and supporting the activities of LAGs. This is done by supporting sustainable sectoral employment, supporting social inclusion and jobs creation, and by adapting the physical and organisational infrastructure of rural tourism companies.

Only 15% of the projects responded to the challenges of sustainable tourism, such as the creation of eco-friendly guesthouses, establishing sustainable electric transport in the region, and the installation of renewable energy facilities.

One in ten of the projects is broadly related to the renovation of local heritage, creation of new local products, and support for local culture and cuisine. Only 8% of them support digital solutions for the development of rural tourism.

3.3. How to make better use of EU funding programmes to strengthen rural tourism in a sustainable way

As already highlighted, during the 2014–2020 funding period the LEADER activities were expanded under Community-Led Local Development (CLLD) to three additional EU funds: the European Maritime and Fisheries Fund (EMFF), the European Regional Development Fund (ERDF), and the European Social Fund (ESF).¹⁰⁶ The LEADER was implemented within the national and regional rural development programmes (RDP) of each EU Member State, co-financed by the European Agricultural Fund for Rural Development (EAFRD).

EU funding programmes provide funding and opportunities to support rural tourism under diverse programmes. The aim of this chapter is to present practical opinions of regional stakeholders on the potential use of existing funds in a sustainable way for rural tourism development.

¹⁰⁶ European Network for Rural Development (n.d.). LEADER/CLLD.

The interviews conducted with a variety of stakeholders revealed several directions in which the EU funding programmes could be addressed in order to strengthen rural tourism.

One of the main challenges identified by a majority of the interviewees is the fact that the funding is distributed between different programmes, and not directly related to rural tourism. Each of the programmes contains elements supporting (rural) tourism development directly or indirectly, but also each of the programmes and funds is driven by different units, with different priorities, objectives and target groups.

The interviewees also pointed to the fragmentation of the focus on rural tourism in different EU strategies. Stakeholders at the local level confirm that the LTVRA focuses on a general vision for the development of rural areas (such as infrastructure development). The available funding is not directed to specific issues, such as tourism, and they see the LTVRA as being too generic in this respect.

In their view, such a situation creates several complications, especially for micro-enterprises. As the CEO of Urlaub am Bauernhof (Holidays on Farm) Austria stated, in order to receive funding and to successfully work with EU funding, the local stakeholders require a high level of administration, skills and work. Bigger stakeholders in agritourism highlight that they are principally happy with EU funding, but at the same time they acknowledge that bureaucracy can be an issue among smaller actors seeking funding.¹⁰⁷

Rural tourism associations also highlight the difficulty in gathering targeted support for stakeholders functioning in rural tourism sectors. Business operators in rural tourism consists mainly of nano-, micro- and (to a limited extent) small enterprises. Their capacity in terms of finance and personnel is limited when it comes to the complicated processes of identifying the right priorities and following the complicated rules.

On top of that they state that European policy is mismatched with the local realities, necessitating a more spread-out administrative service enabling closer work with local businesses, especially micro providers.

¹⁰⁷ Interviewee 6.

According to the representatives of rural tourism trade organisations, in some European countries, the national and regional governments are responsible for creating rules about who can benefit from funding opportunities. In such cases, individuals who provide rural accommodation and rural tourism activities cannot be supported – as private persons. Funding is only available to small or medium enterprises (for example with 6 or 7 employees). This is the situation in Lithuania, for example.¹⁰⁸

A simplified procedure for applying for a low level of funding is needed, which would allow a larger number of individuals/businesses to operate rural tourism activities legally within the tourism industry – and not being subjected to the same rules as international chains of hotels and resorts.

One of the ideas being mentioned is the use of so-called small funds, operating like lump sums. Some parts of the ERDF work in this manner and good be used as a model. As the bureaucracy needed to access the funds is too complicated, a lot of businesses or individuals decide to apply for bank loans, considered easier and less time-consuming.¹⁰⁹

Additionally, stakeholders would also welcome funding possibilities extended to projects aiming to improve the quality of equipment in farms offering tourism, as well as opportunities to support the creation of on-farm experiences, because it seems that support in these areas is rather stagnant.¹¹⁰ Other stakeholders state that funding opportunities could also address destination management as well as monitoring of the flow of tourists, so as to avoid “overtourism” in certain regions. This has to be taken into consideration when planning a region’s development.

As for the future the existing funds properly address rural challenges such as the improvement of transport infrastructure, ICT infrastructure and to some extent upskilling activities. Yet, the direct support for rural tourism stakeholders is seen as a missing link. There is a shortage of tools supporting nano- and micro-enterprises, whose limitations and capacities are not well recognised in the EU strategies and funding opportunities.

¹⁰⁸ Interviewees 1&2.

¹⁰⁹ Interviewees 1&2.

¹¹⁰ Interviewee 6.

4. Description of good practice examples

Following the analysis of the actions being implemented within the last programming period, in Part 3 we provide a review of three good practice examples of initiatives at the local level, using rural tourism to stimulate declining rural areas.

Their selection is based on the following criteria:

- diversified geographical balance: attractive mountainous landscape for ENOTarnowskie projects, coastal landscape in Portugal and the agricultural landscape of Spanish region;
- diverse regional challenges and opportunities are addressed, like the opportunity to use the combination of touristic region and local producers of wineries, as a boost for the economic growth in one of the Polish regions; challenges related to protection of natural habitat from adverse impacts of tourism in Portugal; and the challenges related to the depopulation of a region in Spain.

4.1 ENOTarnowskie¹¹¹



Source: <https://enotarnowskie.pl/>

ENOTarnowskie is a project connecting vineyards, wineries, local producers and agritourism establishments in the Tarnów, Brzesko and Dąbrowa Counties (powiats) as well as in the city of Tarnów, all located in the Pogórze region.

Local and regional context

With over 100 vineyards and wineries, the Małopolska voivodeship, where Pogórze is located, is one of the most dynamically developing wine regions in Poland, thanks to its topography and mild climate. Indeed, the city of Tarnów is believed to be the warmest place in Poland, and has one of the longest vegetation periods in the country, perfect for the cultivation of grapes.¹¹² At the same time,

¹¹¹ Tarnowska Organizacja Turystyczna (n.d.).

¹¹² Urząd Miasta Tarnowa (2011). *Naukowcy sprawdzili: Tarnów Polskim Biegunem Ciepła*.

it is a region featuring predominantly agricultural landscapes, characterised by “high fragmentation of farms, lack of specialisation, underinvestment and poor technical infrastructure”.¹¹³

Local and regional objectives

The goal of the ENOTarnowskie project is to use the potential of the Pogórze region as an enotourism destination to increase the number of tourists visiting the region and, consequently, to increase the region’s revenue from tourism.

Main activities and timelines

One of the first crucial steps towards building the ENOTarnowskie brand was the commissioning in 2017 by the Tarnów Tourism Organisation (TTO) of the study “Strategy for the development of wine tourism as a new tourism brand of the Pogórze region”.¹¹⁴ Since then, the TTO has been consistently developing the project, including through the designing of marketing strategy, the writing of guidebooks and promotional materials, the compiling of tourist packages and improvement of the region’s infrastructure, while at the same time fostering relations between individual stakeholders involved in the project. Financial support was secured by the TTO and Małopolska Winemakers Association for setting up a uniform system of visual identification and tourist infrastructure in the region’s wineries (80% of related costs were reimbursed).¹¹⁵

The project includes a number of events organised annually, both in the region and in the vineyards themselves.¹¹⁶ The wineries also offer individual and group wine tastings, vineyard tours, and tastings of the local cuisine; some of them also offer overnight stays.

To facilitate travel between individual ENOTarnowskie wineries, the Enovelo project – improving bicycle infrastructure in the region – was implemented under the leadership of the Polish Tourism Association and in cooperation with several

¹¹³ Małopolski Ośrodek Doradztwa Rolniczego z siedzibą w Karnowicach (n.d.). *Charakterystyka powiatu tarnowskiego*.

¹¹⁴ Gonera H. & Zych B. (2017). *Strategia rozwoju turystyki winiarskiej jako nowej marki turystycznej Pogórze. In vino veritas. Diagnoza stanu obecnego / pomysły na rozwój enoturystyki na Pogórze i w Polsce*.

¹¹⁵ Chwał P. (2021). *Winnice pod Tarnowem coraz bardziej atrakcyjne. Turystów witają nowe elementy drewnianej infrastruktury. Hitem: ogromne ramy*.

¹¹⁶ Such as the best-established ones, including Wielkie Tarnowskie Dionizje in November, Tuchovinifest in August, Vitis Music Sfera Festival and Pleśnieński Bachus in July, and Wianki na Winnicy in June <https://www.polskiemarkiturystyczne.gov.pl/szczegoly-marki/55-enotarnowskie>

municipalities.¹¹⁷ On a smaller scale, free tours by Enomeleks, connecting wineries in the region, are offered to tourists during summer and autumn.¹¹⁸

Additionally, in order to “inspire residents of other rural areas”¹¹⁹ to create similar cooperative projects and clusters, ENOTarnowskie drew up a guidebook of good practices.

Main actors

Apart from the Tarnów Tourism Organisation, which created ENOTarnowskie, a broad spectrum of stakeholders is engaged in the project: from local vineyards (thirteen as of September 2023, currently producing 50,000 bottles of wine a year¹²⁰) and winemakers’ associations, to local and regional authorities.¹²¹ Moreover, local producers and agritourism establishment owners are involved in various project activities on a regular basis. For example, the publication “Good practices in the field of enotourism in the ENOTarnowskie area” was compiled in collaboration with local farmers, producers and winemakers (30 of them were invited to share their good practices) as well as the Association “On the Plum Trail” (“Na śliwkowym szlaku” in Polish), the Regional Association of Residents of Gmina Wojnicz, and the Municipal Culture Centre in Iwkowa.¹²²

Results

While no data is available on the number of jobs created or changes in income from tourism, the TTO estimates that between 800,000 and 1 million tourists visit the region per year, an increase of 20–30% since the commencement of the project.¹²³ ENOTarnowskie has received two prestigious awards: the “Best Tourist Product” certificate granted by the Polish Tourism Organisation (in 2019)¹²⁴ and “Polish Tourist Brand 2022” [Polska Marka Turystyczna 2022] certificate awarded jointly by the Polish Tourism Organisation and the Ministry

¹¹⁷ Enoveló (n.d.).

¹¹⁸ Tarnowska Organizacja Turystyczna (n.d.).

¹¹⁹ Tarnowska Organizacja Turystyczna (2021). *Katalog dobrych praktyk*.

¹²⁰ Tarnowska Organizacja Turystyczna (n.d.).

¹²¹ Polskie marki turystyczne (n.d.). *Enotarnowskie*.

¹²² Gminny Ośrodek Kultury w Iwkowej (2021). *Realizacja operacji pn. „Dobre praktyki w zakresie enoturystyki na obszarze ENOTarnowskie”*.

¹²³ Interviewee 3.

¹²⁴ Polska Organizacja Turystyczna (2019). *Znany Najlepsze Produkty Turystyczne 2019!*.

of Sport and Tourism of the Republic of Poland (only nine have been awarded thus far in the country).¹²⁵

4.2 Ericeira, Portugal



Source: https://www.cm-mafra.pt/pages/1144?news_id=4952

Local and regional context

Ericeira is a coastal village in Portugal, a short distance from the Lisbon airport. Thanks to its unique location and climate, already in mid-1970s it started attracting surfers from all around the world¹²⁶. Indeed, in 2011 it was named a World Surfing Reserve¹²⁷ (WSR) by the International Save the Waves Coalition and joined the World Surf Cities Network, a club of cities for which surfing-related activities contribute significantly to the local economy and whose authorities acknowledge the importance of surfing for the city's touristic appeal.¹²⁸

At the same time, Ericeira maintains its fishing village identity and, in an effort to attract tourists also outside of the season¹²⁹, the village hosts cultural events such as the Sea Urchin International Festival (taking place every March since 2017¹³⁰).

Local and regional objectives

Preservation of the natural habitat and protection of the local ecosystem is key for Ericeira and its region. Indeed, the municipality of Mafra, where Ericeira is located, since 2021 has been a Biosphere Destination (a title granted by the Institute of Responsible Tourism), with local authorities stressing the need to

¹²⁵ Ministerstwo Sportu i Turystyki (2022). *Wręczenie tytułów w ramach II naboru do projektu Polskie Marki Turystyczne*.

¹²⁶ Save the Waves (2011). *Ericeira*.

¹²⁷ Currently, there are twelve such places. Save the Waves (2011). *Ericeira Rides to World Surfing Reserve Fame*.

¹²⁸ Câmara Municipal de Mafra, (n.d.). *Ericeira World Surfing Reserve*.

¹²⁹ World Tourism Organization (2023) <https://www.UNWTO.org/tourism-villages/en/villages/ericeira/>.

¹³⁰ AZUL Ericeira Mag, (2023). *Festival do Ourico-do-mar Regressa a Ericeira para a 7a edicao*.

achieve “a *balanced relationship between human activity, environmental protection and preservation of historical-cultural heritage*”.¹³¹

Main activities and timelines

In 2017, a Local Stewardship Council of the Ericeira World Surfing Reserve was created specifically to ensure protection of the natural landscape of the WSR. The Council also signed a Memorandum of Understanding with Save the Waves re-committing to implementation of the Ericeira World Surfing Reserve Stewardship Plan, one of which is commitment to establishment of a legally protected coastal zone surrounding Ericeira.¹³²

Indeed, Ericeira is one of three municipalities, alongside Cascais and Sintra,¹³³ that in October 2022 signed a Memorandum of Understanding agreeing to works towards establishment of a Marine Protected Area (AMPIC, Área Marinha Protegida de Interesse Comunitário) covering the waters in their area. The project is to receive 1 million EUR from the Portuguese Environmental Fund (Fundo Ambiental), with the remaining funds coming from the budgets of the three municipalities.¹³⁴

Main actors

Main actors include the Municipality of Mafra and the Local Stewardship Council. The Council consists of Mayor of the City Council and representatives of the municipality of Mafra, representatives of the municipal tourism and environmental services, various local parish councils and surfing associations, local health unit, National Maritime Authority, municipal security forces, Águas de Lisboa and Vale do Tejo, SA (water management authority), and Portuguese Environment Agency.¹³⁵ A close collaborator of the Council is Save the Waves, an organisation behind granting Ericeira a status of a World Surfing Reserve.

Results

In 2023, the Local Stewardship Council designated 15 hectares of coastline as a permanent preservation zone in an effort to protect the coastline and restore native

¹³¹ Câmara Municipal de Mafra, (2021). *Mafra é Destino Turístico Sustentável*.

¹³² Ibidem.

¹³³ União das Cidades Capitais de Língua Portuguesa (2023). *Área Marinha Protegida de Interesse Comunitário – Sintra, Mafra e Cascais*.

¹³⁴ Ambiente Magazine, (2023). *Sintra avança com criação da Área Marinha Protegida de Interesse Comunitário*.

¹³⁵ Full list of the Council members is available at: Câmara Municipal de Mafra, (2017). *Mafra é Destino Turístico Sustentável*.

habitat there and approved a budget of 7 million EUR for a new sewage treatment system in order to improve water quality in the Reserve.¹³⁶ Another expected outcome is creation of the abovementioned Marine Protected Area inclusive of Ericeira, its coastline and waters.

As a sign of recognition of Ericeira's efforts to preserve its natural habitat and cultural identity, it was named one of UN Tourism's 2023 world's Best Tourism Villages.¹³⁷

4.3 Linares de la Sierra, El Valle Escondido (Hidden Valley)¹³⁸



Source: <http://www.linaresdelasierra.com/>

Local and regional context

Linares de la Sierra is a small village situated in Andalusia, one of 17 autonomous communities in Spain.¹³⁹ While the region is highly touristic, with income from tourism accounting for nearly 13% of its GDP¹⁴⁰ and the tourism sector providing close to 14% of its employment,¹⁴¹ the village is located in a rather remote part of Andalusia, an hour and half drive from Seville, and has never been a typical tourist destination. Those tourists who do visit hail predominantly from Spain.¹⁴² Indeed, Andalusia has a particular tourist profile: nearly half (47%) of tourists staying overnight in the region are Spanish (compared to 35% in the country on average).¹⁴³

Local and regional objectives

¹³⁶ Hodges T. (2023). *Win for Ericeira World Surfing Reserve: 15 hectares preserved for restoration and permanent protection.*

¹³⁷ [Ericeira - Best Tourism Villages \(UNWTO.org\)](#).

¹³⁸ See also an in-depth case study focusing on community-based tourism in Linares de la Sierra: Cáceres-Feria, Hernández-Ramírez & Ruiz-Ballesteros (2021). *Depopulation, community-based tourism, and community resilience in southwest Spain.*

¹³⁹ Andalusia Tourist Community (n.d.).

¹⁴⁰ Invest in Andalusia (n.d.).

¹⁴¹ Villegas, Delgado & Cardenete (2022). *The economic impact of a tourist tax in Andalusia examined through a price effect model.*

¹⁴² Cáceres-Feria, Hernández-Ramírez & Ruiz-Ballesteros (2021). *Depopulation, community-based tourism, and community resilience in southwest Spain.*

¹⁴³ Caixa Bank Research (2021). *Autonomous Community profiles – Andalusia.*

The village, like others in the region, is struggling with depopulation, a trend that started in the 1960s (between 1960 and 1970, its population decreased from 601 to 367)¹⁴⁴ and has continued into the 2000s. The development of tourism has been seen as a way of preserving the community and the village itself by offering employment, attracting investment, and reinvigorating community life.

Main activities and timelines

In 2011, the local authorities [ayuntamiento] launched a structured campaign geared at promoting tourism in the village.¹⁴⁵ Linares de la Sierra was branded *El valle escondido*, a hidden valley, and a website¹⁴⁶ and social media channels dedicated to tourists were created. The branding of the village is related to its secluded location and is building on its being surrounded by attractive nature (forests, a national park, and hiking trails).

A number of events, mainly of religious nature, also contribute to the objective of turning the village into a tourism hotspot. These include pilgrimages, celebrations of the Holy Week and the Night of Poets (organised since 2000¹⁴⁷). The most popular event, the celebration of the Reyes Magos (Three Kings), has been organised there every 5 January since 2000, and involves the transformation of the entire village into Bethlehem,¹⁴⁸ with the villagers turning into actors (due to its popularity, a special association named Asociación Cultural Sierra de Picachanes was created to take charge of its organisation).¹⁴⁹

Main actors

As mentioned above, it was the local authorities that in 2000 launched a structured project of turning the village into an attractive tourist destination. However, in Linares de la Sierra, tourism “*involves, both formally and informally, practically the entire village*”,¹⁵⁰ with inhabitants owning local restaurants, offering accommodation, running local shops, and engaging in various events that attract

¹⁴⁴ Cáceres-Feria, Hernández-Ramírez & Ruiz-Ballesteros (2021). *Depopulation, community-based tourism, and community resilience in southwest Spain*.

¹⁴⁵ Ibidem.

¹⁴⁶ Linares de la Sierra (n.d.).

¹⁴⁷ Ibidem.

¹⁴⁸ Turismo Linares de la Sierra (Facebook Page) (2021). *Los Reyes Magos en el Valle Escondido*.

¹⁴⁹ Linares de la Sierra (n.d.).

¹⁵⁰ Cáceres-Feria, Hernández-Ramírez & Ruiz-Ballesteros (2021). *Depopulation, community-based tourism, and community resilience in southwest Spain*.

tourists. Moreover, the six local associations play an active role in the organisation and promotion of various events throughout the year.

Results

Tourism provides additional income to the villagers and is perceived beneficial to the community.¹⁵¹ The success in terms of countering depopulation has thus far been modest; currently (2022), the village has 276 residents,¹⁵² a slight increase from 262 in 2020 (not quite a return to the 2000 level of 316, though).¹⁵³ However, the trend is upward, coupled with a higher number of people moving into the village than migrating away from it (18 versus 9 in 2021).¹⁵⁴

¹⁵¹ Ibidem.

¹⁵² Instituto de Estadística y Cartografía de Andalucía (2023). *Andalucía pueblo a pueblo – Fichas Municipales*.

¹⁵³ Cáceres-Feria, Hernández-Ramírez & Ruiz-Ballesteros (2021). *Depopulation, community-based tourism, and community resilience in southwest Spain*.

¹⁵⁴ Instituto de Estadística y Cartografía de Andalucía (2023). *Andalucía pueblo a pueblo – Fichas Municipales*.

5 Conclusions and recommendations

This study, commissioned by the European Committee of the Regions and realised with the support of the UN Tourism's Regional Department for Europe, deepens understanding of the role of tourism in rural development, while highlighting the importance of this economic activity in the territories at risk of depopulation and discontent.

The study provides insights into the situation of tourism sector in rural areas; assesses the potential for economic development and gives pointers regarding funding opportunities.

Backed by the literature reviews and interviews with experts, it analyses the relationship between various EU tourism strategies and the LTVRA, explores the challenges and opportunities for local public authorities interested in boosting their rural tourism profiles and making tourism an effective tool for rural development.

Several observations can be made as takeaway messages from this report:

➤ ***The LTVRA supports rural tourism – and rural tourism can contribute to the objectives of the LTVRA.***

The LTVRA strategy, across all ten shared goals is set to deliver stronger, connected, resilient and prosperous rural areas by 2040. It recognises the potential of tourist activities in rural areas and their potential to contribute to employment and labour market diversification. Likewise, rural tourism through its job creation and heritage promotion and preservation boosts resilience and attractiveness of rural areas. This virtuous circle merits further research to better capture all aspects of the intertwined connection between tourism and rural development.

➤ ***Tourism is one the key EU economy sectors.***

The tourism sector matters for the economic development of the EU, accounting for 5% of total gross value added to the EU economy, and having successfully recovered after the COVID-19 pandemic in 2023.

➤ ***Rural tourism is well established and keeps growing in popularity.***

Rural tourism is not a new concept and for many years has enjoyed considerable popularity among tourist destinations in the EU. Since the pandemic individual travel preferences have evolved with travellers increasingly opting for destinations closer to home, longer stays, sustainable transport modes and more nature.

➤ ***Rural areas face challenges that may slow down rural tourism development.***

They include challenges related to sub-optimal road and rail connections, problems with digital connectivity, a lower level of entrepreneurial or digital skills among local rural inhabitants, as well as demographic change.

➤ ***Poorly managed rural tourism development may adversely affect local communities***

An uncontrolled growth in tourist arrivals or excessive concentration in one place or at a given time of year, may impact the well-being of local communities. It may lead to an environmental impact (e.g., higher usage of fossil fuels), damage to nature, an increase in waste or littoralisation. Other externalities may include economic impact, such as an increase in property and commodity prices and socio-cultural impact, such as changes in lifestyle and loss of rural heritage.

➤ ***The EU funding programmes support both tourism and rural development.***

While there is no dedicated "EU budget line for tourism", tourism activities and projects can be financed through 14 different programmes and mechanisms. Some are managed by the Member States and their regions, while others through open calls at the EU level.

In the rural development context, LEADER is implemented by over 2800 Local Action Groups, co-financed from the European Agricultural Fund for Rural Development and complemented under the broader term Community-Led Local Development via the European Maritime and Fisheries Fund; the European Regional Development Fund; and the European Social Fund.

The exact number and value of rural tourism projects, supported under all the available funds and programmes, is impossible to assess, given the multitude of funding sources and the fact that the previous programming period 2014-2020 is still ongoing.

This study has assessed multiple opportunities and challenges for rural tourism development. On the basis of its finding, several recommendations can be made to realise the potential of rural areas and their tourism offer, to mitigate any negative externalities and to give support to public authorities embarking on transformation pathways.

➤ ***Prioritise digital transformation of rural areas.***

Digital gap between urban and rural areas, insufficient infrastructure and lack of relevant skills hampers further development of tourism. The roll-out of broadband into the rural areas must be accompanied by skill development strategies, to enable rural communities to get fully digitally literate and confident to use new technologies to devise, implement and monitor their tourism strategies and tourist flows.

➤ ***Plan ahead and ensure local ownership and leadership over rural tourism strategies.***

As any economic activity, tourism does not happen in a vacuum and requires a strategy to grow sustainably. Bringing local community on board, listening to citizens' ideas and objections can help mitigate loss of the local community's control over their territory. Any local tourism development plan should address the risk of environment, economic social and cultural impact and include measures to monitor and mitigate these impacts. This requires access to timely and accurate data.

➤ ***Keep it sustainable – it is not about volume; it is about quality.***

Over-tourism can adversely affect rural communities. It can lead to overconsumption of limited resources, change the power equilibrium and push local inhabitants away from their neighbourhoods. It can also damage rural value chains, reducing opportunities in other rural business development. The planning and monitoring of sustainable tourism at the local level is an absolute necessity.

➤ ***Integrate tourism into a broader rural development strategy***

Prosperous rural areas need a broad range of economic activities and sectors to mutually reinforce one another and to secure a stable source of revenue all

year long. Tourism sector, although subject to seasonality and changing fashion trends, can stimulate other rural ecosystems, highlighting rural craftsmanship, promoting local gastronomy and attracting new business operators. All these elements must be captured in rural development strategies.

➤ ***Promote local entrepreneurship and provide people with learning opportunities***

Starting a new business can be a daunting task, especially without the right skills and support. Providing access to relevant training opportunities, promoting re- and upskilling, normalising life-long learning and offering technical support to future and current entrepreneurs can inject a new life into a local economic life. Specialised training for local public authorities, to enhance their technical capacity in navigating rural development, might also prove beneficial in this respect.

➤ ***Build local community partnerships.***

It takes a village... to revive a village. The LTVRA is an initiative built in the collaborative process of LAGs and local stakeholders. A similar "all-hands-on-deck" approach can be applied to other aspects of tourism and rural development agendas, in particular to private-public partnerships. Joining forces to deliver regional transformation processes and to fund key initiatives magnifies chance of success and creates a sense of ownership.

➤ ***Simplify access to funding for local rural tourism projects.***

Applying for EU funds is not an easy feat, especially for inexperienced and smaller organisations. Identifying best opportunities, finding suitable partners and meeting all requirements remains a challenge for many rural tourism actors. Simplified procedures for smaller grants with more involvement of local public authorities could address this issue and increase the rate of successful applications. This holds particularly true for tourism SMEs that are the backbone of the ecosystem.

➤ ***Give visibility to successful initiatives and learn from the best.***

The case studies presented in the report show that initiatives implemented comprehensively with local socio-economic stakeholders, can make real

difference in terms of income diversification, population increase or regional attractiveness. These and many more initiatives merit the spotlight; they can be the source of inspiration to other rural areas in Europe.

➤ ***Improve data collection and collation.***

Despite many positive examples described in this study, the research points out to a lack of data at the regional and local level. The data available are often outdated, fragmented and incomparable. Better indicators, unified collection methods and calendars as well as periodic data assessment and publication would greatly help both public authorities as well as the EU institutions to define their policy goals and allocate adequate resources for an effective implementation of tourism and rural development strategies on the ground.

Harnessing the power of tourism to drive rural development will enhance the resilience of EU rural areas and contribute to a better future of many Europeans. It can also help the EU to move closer to achieving several of the UN Sustainable Development Goals. For it to happen, the Union together with its cities and regions, need an integrated and multifaceted approach to tourism for rural development with a long-term vision towards 2030 and beyond.

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Annex I. Interview questionnaire

The interviews with selected stakeholders provide us with input on:

- Validation of desk research performed by the CASE research team with regard to (1) trends identified in the EU supporting rural tourism activities; (2) current and future challenges, as well as opportunities stemming from tourism development in rural areas; (3) negative impacts of tourism development in rural areas and means of addressing such externalities.
- Identification of the financial gaps in the support of rural tourism development and integration of rural tourism into national, regional, and local strategies for rural areas.
- How can public authorities make better use of the European Regional Development Fund (ERDF) and other EU funding programmes to strengthen their rural tourism operations?

Part 1: Rural tourism

- Do you agree with the proposed definition of rural tourism?
- Do you agree with the statement that remote (rural) destinations are gaining more and more attention from tourists?

Part 2: Challenges connected to rural development through tourism

- Can you comment on the challenges identified for rural tourism? Would you like to add other challenges to the list?
- What challenges for the future do you believe can be foreseen (ones not already mentioned)?
- Do you know any examples of policies/initiatives that would be helpful in combatting such challenges? How would you see their implementation in rural regions?

Part 3: Opportunities connected to rural development through tourism

- Can you comment on the opportunities identified for rural tourism? Would you like to add any other challenges to the list?
- Can you think of other opportunities foreseen for the future? (ones not already mentioned)?
- Do you know any examples of policies/initiatives that would seize such opportunities?
- How would you see their implementation in rural regions?

Part 4. Negative impacts of rural development through tourism

- Do you agree with the negative impacts of tourism in rural areas that have already been identified? Would you add anything to the list?
- Do you know any examples of policies/initiatives that would mitigate or combat such externalities?

Part 5. Long-term vision for rural areas and tourism

- Is tourism, in your opinion, well integrated into the long-term vision for rural areas?
- Are you aware of any initiatives, financial support or policies developing the concept of rural tourism? Do you know any successful regions using rural tourism as a boost to grow? Are you able to assess the extent to which the local authorities have engaged in existing EU initiatives supporting rural tourism?
- Can you identify any administrative, legal, or regulatory obstacles to rural tourism development or implementing initiatives that support rural tourism?
- In light of the challenges and opportunities identified, how can public authorities make better use of European funds to support rural tourism?
- Are there important areas of development that lack support from the EU? What initiatives could be taken to address these issues?

Annex II. List of interviewees

1. Agne Vaitkuvienė, President, European Federation of Rural Tourism RuralTour (online interview).
2. Klaus Ehrlich, General Secretary, European Federation of Rural Tourism RuralTour (online interview).
3. Marcin Pałach, Director of Tarnowskie Centrum Informacji and President of the Management Board of Tarnów Tourism Organisation (online interview and e-mail exchange).
4. Anonymous interviewee (policy-level).
5. Roberto Berutti, Member of Commissioner Janusz Wojciechowski's Cabinet (online interview).
6. Mag. Embacher, CEO of Urlaub am Bauernhof (Farm Holiday) Austria.
7. Florian Größwang, TourCert Austria from 2023 ongoing, COO (Chief Operating Officer) / Österreich Werbung / Austrian National Tourist Office 2019–2022 – Salzburg State Board of Tourism 2015 – 2019 (online interview).
8. Sandra Carvao, Director of Tourism Market Intelligence and Competitiveness at the World Tourism Organization UN Tourism (online interview).



**European Committee
of the Regions**

Created in 1994, the European Committee of the Regions is the EU's political assembly of 329 regional and local representatives such as regional presidents or city-mayors from all 27 Member States, representing over 446 million Europeans.

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