Agro-Rural Tourism Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> **Industry:** Specialty, Niche & Experience Tourism (Hospitality & Tourism)
> **Source:** https://www.mordorintelligence.com/industry-reports/agro-rural-tourism-market
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 104.07 billion
Projected Forecast (2031)	USD 104.07 billion
Growth Rate (CAGR)	6.97 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

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![Major players in Agro-Rural Tourism industry](images/chart_2.png)

![Agro-Rural Tourism Market (2026 - 2031)](images/chart_3.png)

![Agro-Rural Tourism Market: Market Share by Tourism Type](images/chart_4.png)

![Agro-Rural Tourism Market CAGR (%), Growth Rate by Region](images/chart_5.png)

![Agro-Rural Tourism Market Concentration](images/chart_6.png)

![Icon](images/chart_7.png)

![footer background image](images/chart_9.png)

![Mordor Intelligence on Facebook](images/chart_11.svg)

![Mordor Intelligence on Pinterest](images/chart_13.svg)

![Mordor Intelligence on Instagram](images/chart_14.svg)

![ESOMAR](images/chart_16.png)

![GPTW](images/chart_18.png)
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Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market Overview

Study Period | 2021 - 2031 |
Market Size (2026) | USD 104.07 Billion |
Market Size (2031) | USD 145.82 Billion |
Growth Rate (2026 - 2031) | 6.97 % |
Fastest Growing Market | Asia Pacific |
Largest Market | Europe |
Market Concentration | Low |
Major Players*Disclaimer: Major Players sorted in no particular order

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Market Overview

Agro-Rural Tourism Market Analysis by Mordor IntelligenceThe Agro-Rural Tourism Market was valued at USD 97.35 billion in 2025 and is estimated to grow from USD 104.07 billion in 2026 to reach a higher valuation by 2031, at a CAGR of 6.97% during the forecast period (2026–2031). Growth is driven by expanded rural programs in regions like Ireland, Scotland, and India, which are boosting demand for experience-focused rural travel. The shift from suppressed travel levels in 2020-2023 to immersive, farm-centered stays offers farm businesses opportunities to diversify income and manage commodity price fluctuations. Policy frameworks, such as the Philippines' 2026-2031 plan, are strengthening farmer incomes by linking accredited farms with institutional buyers. Digital booking platforms and community discovery channels are improving market access, while enhanced compliance and visitor safety standards in mature regions are fostering trust among families and international travelers, further supporting the market's expansion.

Key Report Takeaways

* By tourist type, agri-stay (farm accommodation) held the largest share of the Agro-Rural Tourism market in 2025 at 38.42%, while others (agri-volunteer, agri-wellness, etc.) are projected to post the fastest 2026–2031 growth at an 8.94% CAGR.
* By booking channel, direct bookings (farm website/phone) accounted for 44.15% of the Agro-Rural Tourism market share in 2025, while social-media and community platforms are projected to record the highest growth at a 9.97% CAGR through 2031.
* By travelers type, domestic tourists held the largest share of the Agro-Rural Tourism market in 2025 at 73.65%, and are also projected to grow at a 7.04% CAGR through 2031.
* By revenue source, accommodation accounted for 32.75% of the Agro-Rural Tourism market share in 2025, while retail (farm shop, crafts) is projected to expand at an 8.45% CAGR through 2031.
* By geography, Europe captured 32.50% of the Agro-Rural Tourism market share in 2025, while Asia-Pacific is projected to grow the fastest at an 8.92% CAGR through 2031.

Key Market Trends

Global Agro-Rural Tourism Market Trends and InsightsDrivers Impact Analysis*

Driver	% Impact on CAGR Forecast	Geographic Relevance	Impact Timeline
Rising preference for immersive and experience-led travel	1.9%	Global, with early concentration in Northern Europe, Japan and the United States coastal states	Medium term (2-4 years)
Increasing policy support for rural tourism through government subsidy programs	1.5%	Asia-Pacific core (India, Philippines, China), spillover to Middle East and Africa (Saudi Arabia, Oman)	Long term (≥ 4 years)
Growing need for income diversification among farming communities	1.3%	North America & European Union (farm income stress zones), expanding to Latin America	Short term (≤ 2 years)
Rapid expansion of digital booking platforms for short-duration rural stays	1.2%	Global, led by North America and Western Europe, accelerating in Asia-Pacific urban corridors	Short term (≤ 2 years)
Increasing consumer inclination toward sustainable and carbon-conscious travel experiences	1.0%	Northern Europe, Scandinavia, Pacific Northwest United States, New Zealand, spill to urban Asia-Pacific	Medium term (2-4 years)
Emergence of rural locations as attractive hubs for remote workers and long-stay travelers	0.9%	Europe (Spain, Portugal, Italy), Asia-Pacific (Indonesia, Thailand), Americas (Mexico, Costa Rica)	Short term (≤ 2 years)

Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

The agro-rural tourism market remains fragmented: the five largest brands collectively command only one-fourth of revenue, preserving a low consolidation barrier while encouraging hyper-local differentiation. Harvest Hosts leads platform-centric solutions, attracting RV travelers via subscription benefits and exclusive farm parking. Farm Stay United States and Farm Stay United Kingdom operate curated directories that vet quality and provide joint marketing campaigns for smallholdings that lack individual advertising budgets. WWOOF International coordinates volunteer labor exchanges across 130 nations, leveraging non-cash value propositions to expand global reach. Agritours Canada packages multi-farm circuits geared toward international visitors, highlighting maple forests in Quebec and wheat fields in Saskatchewan.

Competition centers on authenticity, technological ease, and regulatory knowledge. Farms integrating user-friendly booking engines and live-chat support reduce friction, boosting conversions. Location-based AR games, evidenced by ScienceDirect research, raise visitor dwell time and average spend as travelers hunt virtual rewards among real crops. Operators with strong community ties secure local produce supply chains, ensuring food freshness and authenticity. Marketing collaborations with nearby microbreweries or cheesemakers produce bundled itineraries that leverage multi-brand storytelling. Large hospitality groups cautiously explore the space through minority stakes in established farm networks, suggesting a future where hybrid models combine corporate efficiencies with farm authenticity.

Strategic moves highlight a tilt toward data-centric expansion. Harvest Hosts' July 2024 acquisition of Escapees RV Club unlocked a synergistic community and enriched data pools, enabling targeted promotions based on route histories. Regional tourism boards invest in capacity-building workshops to level technological competencies across operators, recognizing that digital literacy directly influences visitor satisfaction. Insurance firms craft bespoke policies for agri-tourism, using telematics to price risk dynamically based on event calendars and livestock density. Over the medium term, analytics-driven yield management may become a norm, allowing farms to adjust package prices based on weather forecasts and social-media sentiment.

Early movers in the inventory aggregation space, be it by region or theme, stand poised to forge robust and defensible brands. Yet, the scalability of these uniform models grapples with challenges posed by hyper-local heritage and linguistic diversity. The most adept aggregators honor local autonomy, offering communal resources such as marketing, booking platforms, and training, instead of imposing a stringent branding. This federated strategy resonates with travelers' desires for genuine and diverse experiences, guaranteeing that growth amplifies, rather than diminishes, the distinct allure of the agro-rural tourism market.

Agro-Rural Tourism Industry Leaders* Feather Down Farms

* Harvest Hosts

* Farm Stay USA

* WWOOF International

* Farm Stay UK

* *Disclaimer: Major Players sorted in no particular order

Component Component 3 Scope Of The Report Bottom

Global Agro-Rural Tourism Market Report ScopeThe scope of the Agro-Rural Tourism Market covers all tourism activities centered on farm-based stays, rural experiences, and countryside cultural engagement, including accommodation, recreation, education, events, wellness, and on-farm retail. The study defines the market as tourism occurring within working farms and rural communities, excluding urban hospitality and non-agricultural adventure tourism. It analyzes global market size, forecasts, drivers, restraints, regulations, technology trends, and competitive dynamics across tourism types, booking channels, traveler categories, revenue streams, and regions, providing a comprehensive view of growth patterns and structural opportunities within rural tourism ecosystems.

By Tourism TypeAgri-stay (farm accommodation) |
Agri-education (classes & tours) |
Agri-recreation (outdoor activities) |
Agri-events & festivals |
Others (Agri-volunteer (WWOOF, farm work) Agri-wellness (yoga retreats, nature therapy)) |

Segmentation Accordion Item

By GeographyNorth America | Canada |
| United States |
| Mexico |
South America | Brazil |
| Peru |
| Chile |
| Argentina |
| Rest of South America |
Europe | United Kingdom |
| Germany |
| France |
| Spain |
| Italy |
| BENELUX |
| NORDICS |
| Rest of Europe |
Asia-Pacific | India |
| China |
| Japan |
| Australia |
| South Korea |
| South-East Asia |
| Rest of Asia-Pacific |
Middle East & Africa | United Arab Emirates |
| Saudi Arabia |
| South Africa |
| Nigeria |
| Rest of Middle East & Africa |

Frequently Asked Questions

What is the current size and growth outlook for the agro-rural tourism market?

The agro-rural tourism market size is USD 104.07 billion in 2026 and is forecast to reach USD 145.82 billion by 2031 at a 6.97% CAGR over 2026-2031.

Which region leads and which grows fastest in agro-rural tourism through 2031?

Europe leads with 32.50% in 2025, while Asia-Pacific is projected to be the fastest-growing at a 8.92% CAGR through 2031.

Which segments are the largest and the fastest-growing in this space?

Agri-stay leads by tourism type with 38.42% in 2025, while Others (Agri-volunteer, agri-wellness etc) is projected to grow fastest at 8.94% CAGR to 2031.

How are booking channels shifting in agro-rural tourism?

Direct bookings hold a 44.15% share in 2025, and social-media and community platforms are forecast to grow fastest at 9.97% CAGR to 2031.

What is the primary demand mix between domestic and international travelers?

Domestic tourists accounted for 73.65% of arrivals in 2025, also Domestic tourists are projected to grow at a 7.04% CAGR through 2031.

Which revenue streams are scaling fastest for farm operators?

Accommodation accounts for 32.75% of farm income in 2025, and Retail (farm shop, crafts) are growing fastest at an 8.45% CAGR through 2031.