

Highlights Report

# The Rural Tourism Renaissance

Uncovering Europe's Hidden Economic Powerhouse

# Introduction

**Rural tourism stands as a central pillar of Europe's economic future, yet it remains largely invisible in policy discussions and investment priorities.**

This report positions rural destinations not as a niche segment, but as essential drivers of balanced regional development capable of bridging the growing divides between urban prosperity and rural decline.

Analysis includes Airbnb's search and booking data spanning 2018 to 2024 across eight European countries: Belgium, France, Germany, Ireland, Italy, the Netherlands, Spain and the United Kingdom. Working at the NUTS 2 regional level, we separated city, suburban and rural listings and searches to isolate rural tourism activity in the data. References and data in this report in relation to "rural" and "rural Airbnb host" are based on Eurostat's definition, which is determined by total population and population density<sup>1</sup>

Airbnb and the Digital Tourism Think Tank call for greater policy attention, improved data visibility and targeted support, including local regulations that enable the development of much-needed tourism accommodation in rural communities. As traditional industries decline and young people leave for cities, tourism offers a practical pathway to reverse depopulation, create employment and strengthen the communities that form the backbone of European society.



# Economic Performance Indicators and Direct Impact

## **88% increase in nights booked**

Rural accommodation bookings surged between 2019 and 2024, demonstrating sustained visitor demand.

## **€4.06 billion in rural host earnings**

Rural Airbnb hosts across the eight European countries generated income directly supporting local households in 2024.

## **€5,200 average income per host**

Rural hosts earned supplementary income, helping to close the persistent €2,800 income gap between rural residents (€18,352) and their urban counterparts (€21,136).

## **The proportion of jobs in tourism grew by 3.6% in remote rural areas over two decades**

Between 2000 and 2022, remote rural areas increased their proportion of tourism-related jobs by 3.6%, while urban areas saw a 0.7% decline.

**Up to 85% of visitors from domestic markets**

Rural destinations maintain strong domestic visitor bases, creating resilience against international travel disruptions.

**49% larger travel groups in rural areas**

Rural accommodation attracts larger parties than cities, reflecting a strong appeal for families and group gatherings.

**Four times more guest nights per resident**

Rural areas welcome nearly four times more overnight visitors relative to population than urban destinations.

## Rural Tourism: Europe's Hidden Economic Engine

**Rural destinations are outperforming cities across nearly every tourism indicator, yet remain largely invisible in data collection and policy discussions.**

This gap reflects a fundamental oversight in how Europe measures and values tourism's contribution to balanced regional development. While tourism in major cities dominates headlines and policy attention, rural areas are quietly demonstrating tourism's most impressive economic returns and strongest job creation potential.

Analysis of Airbnb's booking data in the eight countries analysed suggests rural host earnings grew by 162% between 2019 and 2024, representing an 88% surge in nights booked<sup>2</sup>. This growth occurred despite inflationary pressures and cost-of-living challenges, demonstrating rural tourism's enduring appeal to visitors seeking authentic experiences.

Occupancy rates in rural accommodation also increased by 5%, whilst city destinations saw occupancy decline by 9%<sup>3</sup>. This confirms a fundamental shift in traveller preferences away from crowded urban centres towards rural destinations offering space, tranquillity and genuine cultural immersion.

**Rural areas attract nearly four times more guest nights relative to their population than urban destinations<sup>4</sup>.**

This visitor density creates substantial economic opportunities whilst spreading benefits across wider geographic areas. Unlike city tourism, which concentrates economic activity in specific districts, rural visitor spending distributes throughout entire regions, supporting village shops, family farms and local artisans.

Research demonstrates that every euro spent on agricultural produce generates €2.47 in wider economic benefits<sup>5</sup>, exceeding urban hospitality's €2.16 impact<sup>6</sup>. This higher return reflects rural tourism's tighter integration with local supply chains. When visitors stay in rural homes, purchase directly from producers and dine at family-run restaurants, money circulates through the community multiple times. With 96% of European travellers prioritising purchases from local shops when travelling, this creates powerful returns that strengthen entire rural economies<sup>7</sup>.

## Short-Term Rentals: Essential Infrastructure for Rural Communities

**Traditional hotel investment rarely reaches rural areas, creating persistent accommodation gaps that limit economic opportunity.**

Short-term rentals disperse travel away from overcrowded cities, with the majority of listings on Airbnb (55%) and the majority of Airbnb guest nights (59%) in the EU in 2024 located outside cities<sup>8</sup>. Within cities, listings on Airbnb can generally be found in all neighbourhoods, including the less popular neighbourhoods, whilst hotels are often concentrated in the busiest areas.

This is because hotel chains concentrate in cities, where visitor volumes justify financial investment. France exemplifies this pattern, with 82% of chain hotel rooms located in cities whilst rural areas host just 4% of chain capacity<sup>9</sup>. This systematic under-provision creates communities where tourism potential remains unrealised despite growing visitor demand.

Short-term rentals solve this infrastructure challenge by enabling communities to scale accommodation capacity without substantial capital investment. Rural residents can welcome visitors using existing housing, converting spare bedrooms and unused spaces into accommodation for visitors. Data from France again proves particularly revealing. While hotels are located in only 7,000 (20%) of the 35,000 French communes<sup>10</sup>, short-term rental accommodation can be found in more than 29,000 communes (82%)<sup>11</sup>. This distributed accommodation model fits rural economies, providing visitors with unique stays in authentic settings that reflect local character.

### Hotel Penetration and Short-Term Rental Penetration

#### Hotels

**20%**

of French communes

**7,000 communes with hotels**

#### Short-Term Rentals

**82%**

of French communes

**29,000 communes with STRs**

*Figure 1: Short-Term Rentals Provide Necessary Rural Accommodation Capacity*

In 2024, rural Airbnb hosts across the eight European countries earned €4.06 billion, with the average host taking home over €5,200<sup>12</sup>. While this might appear modest, it represents a 29% income boost for the typical rural resident earning €18,352 annually. This supplementary income makes the critical difference between economic viability and the need to seek opportunities elsewhere, helping to close the persistent €2,800 income gap between rural and urban residents<sup>13</sup>.

In Spain's small towns alone, short-term rental guests spent €5.56 billion directly in communities during 2024, supporting farmers, artisans and family-run businesses<sup>14</sup>. This creates returns where one household's supplementary income becomes an opportunity for community-wide economic development, generating employment that provides reasons for young people to remain in rural areas.

*Figure 2: Total Contribution of Rural Airbnb Host Earnings by Country*

Market	Rural Tourism Value
Belgium	€0.05 billion
France	€1.67 billion
Germany	€0.20 billion
Ireland	€0.15 billion
Italy	€0.55 billion
Netherlands	€0.04 billion
Spain	€0.35 billion
United Kingdom	€1.06 billion

Based on 2024 booking data

## Building Resilience Through Domestic Markets

Rural tourism's strong domestic foundation creates advantages that cities cannot replicate.

Research demonstrates that rural regions derive 70-75% of visitors from domestic markets<sup>15</sup>, reducing vulnerability to international travel disruptions. Despite natural differences in European holiday patterns, analysis of country-specific data shows how countries like the UK benefit from an 85% share of domestic bookings in rural destinations.

This domestic strength for rural bookings proved decisive during the COVID pandemic when international travel collapsed. Analysis of Airbnb's booking data in the eight countries analysed, shows that rural areas captured 33% of total tourism revenue of those countries in 2021<sup>16</sup>, with the remaining spread across urban and suburban areas. This is up from 21% in 2019<sup>17</sup>, as domestic travellers sought safe, uncrowded destinations accessible by car.

Although rural tourism's share declined slightly from its 2021 peak, rural areas maintained 26% of total tourism revenue in 2024<sup>18</sup>, still 5 percentage points higher than pre-pandemic levels. This demonstrates a fundamental and lasting change in traveller preferences, favouring rural destinations closer to home.

### Rural Tourism's Growing Share of Total Revenue

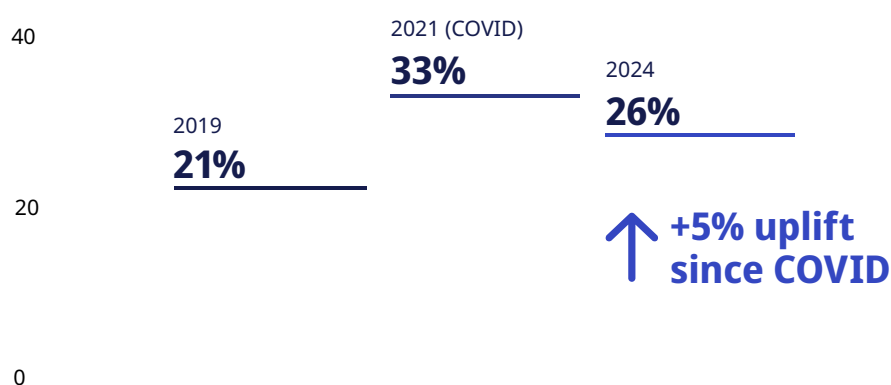


Figure 3: A Permanent Shift in Rural Tourism Demand

Based on 2019, 2021 and 2024 booking data



## Strengthening Rural Communities and Bridging Divides

**Tourism is revitalising rural communities, supporting local businesses, sustaining cultural traditions and offering young people real reasons to stay or return.**

Along Ireland's Wild Atlantic Way, new businesses have grown by 60%, illustrating how tourism demand can spark wider economic impact<sup>19</sup>. In England, for example, tourism accounts for 14% of jobs in rural locations compared to just 11% in cities, but this figure reaches 23% in remote rural locations, demonstrating its critical importance to isolated communities facing the decline of traditional industries<sup>20</sup>. In fact, across the EU, between 2000 and 2022, remote rural areas increased their proportion of jobs in trade, transport and accommodation and food service activities by 3.6%. Urban areas, by contrast, saw this decline by 0.7%<sup>21</sup>.

This transformation requires urgent policy attention. Current approaches disadvantage rural areas through investment focused on cities, regulations designed for urban contexts and measurement systems that render rural tourism invisible. To capture this substantial opportunity, policymakers must recognise rural tourism as a strategic priority for economic development and implement supportive regulatory frameworks that enable rather than constrain rural accommodation growth. They also need to establish systematic measurement of rural tourism's economic contribution to inform evidence-based policy decisions.

### Tourism employment increasing in rural areas and decreasing in urban

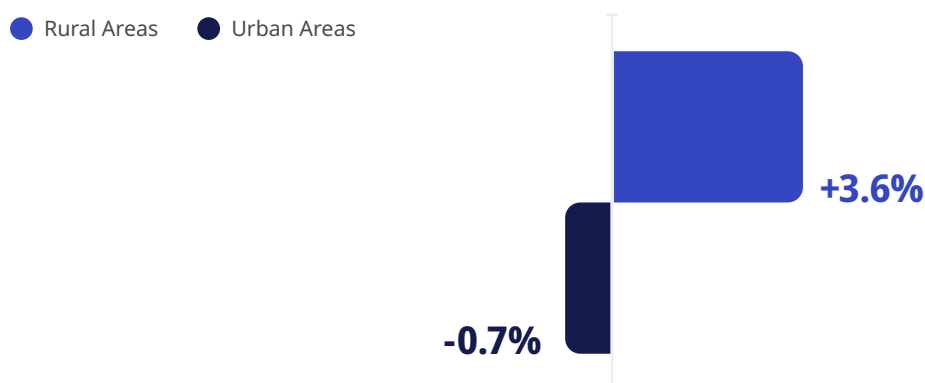


Figure 4: Growth in Tourism Employment in Remote Rural Areas

# Five Trends Reshaping Rural Tourism

Rural tourism is moving beyond passive sightseeing towards experiences that generate substantial economic impact throughout the year.

Analysis reveals five demand-driven trends attracting distinct visitor segments seeking authentic experiences: passion tourism, digital detox, provenance and authenticity, cultural heritage and rural microcations. Each trend demonstrates how rural areas transform unique natural and cultural assets into compelling experiences that create employment, support local businesses and strengthen community economies.

## Passion Tourism: How Hobby Holidays Are Filling the Off-Season

Rural destinations can develop year-round visitor appeal by identifying distinctive characteristics that attract passionate enthusiasts during shoulder seasons. Dark sky tourism exemplifies this opportunity. The August 2026 total solar eclipse, continental Europe's first since 1999, has already driven an 830%<sup>22</sup> increase in Airbnb searches for eclipse week in Spain, with six of the ten most-searched destinations in rural Aragón. This surge demonstrates how unique astronomical events can transform rural economies, particularly through flexible accommodation platforms that can scale rapidly to meet unexpected demand.

## The Great Rural Reset: The Rise of Digital Detox

Rural destinations should position wellness as a core development priority, creating frameworks that link food, place, community and culture. Authentic wellness experiences rooted in local tradition distinguish rural destinations from urban, attracting younger travellers seeking a genuine connection to nature. A good example is Nourished in Nature. Nourished in Nature is a family business in County Sligo, which offers foraging tours and seaweed workshops that attract 150-500 visitors annually, with 50% identifying as health and wellness tourists<sup>23</sup>. The business demonstrates how alternative wellness experiences rooted in local tradition can draw visitors to rural destinations, whilst supporting local economies.

## Authentic Luxury: From Provenance to Preservation

Rural destinations can build sustainable tourism by protecting authentic heritage through formal designation systems. France demonstrates this approach through wine tourism, which brings €5.4 billion annually to French wine regions, with direct activities

generating €1.8 billion and related services, including accommodation, dining and cultural activities, contributing €3.6 billion<sup>24</sup>. The Var department exemplifies this model through villages like Bandol, where 25 centuries of winemaking tradition are protected by Appellation d'Origine Contrôlée (AOC) certification established in 1941. This formal protection preserves local heritage and traditional methods, which have been shaping the distinctive rural destination identity that attracts visitors and supports rural economies.

## **Cultural Heritage Tourism: How Cultural Routes Are Reviving Rural Economies**

Rural destinations should audit historical and cultural assets to identify unique routes or experiences that attract heritage travellers. Partnerships with cultural organisations help to establish authentic experiences, whilst initial investment in route development creates year-round impact. Pilgrimage tourism in Italy is a strong example of this as it attracts high-value visitors actively seeking transformative experiences, combining the physical challenge of walking a pilgrimage route itself with local cultural discovery. The 300-kilometre Cammino di San Benedetto represents a great opportunity for heritage tourists seeking authenticity in rural Italy.

## **Rural Microcation: How Conscious Travellers are Redefining Getaways**

Rural destinations within easy reach of urban centres can capture growing demand for short, frequent, low-carbon breaks by developing cycling infrastructure. Creating 2-3 day itineraries that connect villages, heritage sites and natural attractions, by bike, encourages this climate-conscious microcation. Cycling tourism exemplifies how rural destinations can meet this demand for low-carbon, accessible microcations. This is because research suggests that 38% of cycling tourists choose this type of travel activity for environmental reasons<sup>25</sup>.

# Technology and Digitalisation in the Rural Context

Technology is reshaping how rural destinations compete, turning traditional barriers into opportunities whilst preserving authentic character.

The report outlines five technological advances that demonstrate how destinations harness digital innovation to address longstanding challenges around discoverability, seasonality and visitor dispersal.

## Artificial Intelligence: Opportunities for Rural Destinations

Rural destinations must prioritise improving their digital presence by ensuring comprehensive information becomes available for AI systems to discover. Creating detailed online content and authentic experiences enables AI to recommend rural destinations the same way it suggests cities. Atout France's AI assistant MarIAnne is a great example of this. MarIAnne creates highly personalised multi-day itineraries whilst specifically focusing on distributing visitor flows away from overcrowded areas. Since launch, the platform has generated 25,000 sessions and 11,000 complete itineraries, with a 92% satisfaction rate proving that personalised AI recommendations successfully meet user expectations<sup>26</sup>.

## Mobile Applications: Making Rural Destinations Accessible and Engaging

Rural destinations should ensure recommended apps and digital tools work without an internet connection in remote locations. Partnering with app developers to deliver solutions with robust offline capabilities and testing digital tools in actual field conditions proves essential for visitor safety. iNaturalist exemplifies this approach as a biodiversity observation platform with over 302 million observations from 9.3 million users worldwide<sup>27</sup>. The app uses image recognition to identify local flora and fauna in real-time, whilst its mobile edge computing capabilities allow users to capture and log observations offline in remote areas without signal. This demonstrates how offline functionality proves essential for both visitor engagement and safety in rural destinations.

## **Immersive Storytelling: Creating Emotional Connections Through Technology**

Rural destinations should adopt technology approaches that empower visitors to independently discover unique experiences through tools like AR and gamification. Creating location-based immersive experiences builds emotional connections that generate sustained economic impact. The Slovenian Tourist Board's "Hike Safe" initiative exemplifies this approach as an AR game on Snapchat, which transforms safety guidelines into an interactive, high-engagement learning experience. By integrating gamification with location-relevant content, "Hike Safe" raises awareness about responsible hiking and seasonal preparedness, whilst establishing a scalable model for visitor safety communication in rural destinations.

## **Leveraging Digital Intermediaries: Creator-Led Content Strategies**

Rural destinations should strategically partner with content creators, focusing on those whose audiences align with a destination's authentic culture and experiences. Supporting creators with access to local knowledge and communities leads to compelling storytelling that inspires travel planning. This is essential for promoting rural destinations because it allows businesses and destinations to reach potential visitors in the channels where they spend most of their time, enabling genuine stories to be shared in ways that feel natural and engaging.

## **Data-Driven Strategies: Destination Management with Intelligent Data Signals**

Rural destinations must deploy visitor dispersal strategies that integrate technology. Investing in real-time crowd monitoring systems creates dual benefits: visitors gain better experiences by avoiding crowds, whilst destinations protect the very landscapes that attract these visitors in the first place. Visit Skåne's "Uncrowded" platform exemplifies this approach by combining historical data from vehicle counters, real-time weather forecasts and sensor updates refreshed every 15 minutes to predict visitor numbers at different attractions accurately.

By providing actionable insights into anticipated crowd levels, the platform encourages visitors to select less crowded alternative destinations or plan visits during off-peak times. This data-driven approach distributes tourism more sustainably, prevents excessive strain on delicate natural environments and ensures their preservation.



## The 8 Keys to Rural Renaissance

### 01.

#### **Recognise Rural Tourism as an Economic Powerhouse**

Rural tourism's economic impact far exceeds that of cities, making it a critical driver for rural communities. National and regional destinations must challenge the perception of rural tourism as a niche segment and instead position it as a strategic priority for economic development and job creation.

### 02.

#### **Destinations Should Play to Their Strengths**

To attract visitors seeking a true sense of place, rural destinations must actively identify, embrace and promote their unique local identity. This starts with honest assessments of what makes destinations distinctive and then investing in preserving and showcasing authentic character.

### 03.

#### **Target Specific Audiences and Adapt to Their Needs**

From adventure enthusiasts to wellness seekers, rural destinations succeed by identifying specific target audiences and developing experiences that meet what they seek. This requires understanding the behaviours and values of different visitor segments and investing in regular monitoring of consumer trends.

## 04.

### **Short-Term Rentals are Essential for the Rural Visitor Economy**

Hotels often struggle to justify the investment required for development in rural communities, creating an urgent need for alternative accommodation solutions. Rural destinations must recognise short-term rentals as essential infrastructure enabling flexible and scalable accommodation models.

## 05.

### **Tailored Approaches are Needed for Unique Rural Characteristics**

Rural destinations must resist applying existing frameworks and instead develop strategies suited to their own unique circumstances through strategic investment in obtaining specific data on local tourism performance and avoiding decisions based on assumptions.

## 06.

### **Build Collaborative Regional Partnerships**

Joint initiatives amongst rural communities for experience development and marketing enhance the appeal of small destinations struggling to achieve visibility. Rural destinations should identify natural partnerships based on geographic proximity and work together under broader regional banners.

# 07.

## **Leverage Emerging Technologies to Compete Effectively**

Increasing digital connectivity in rural areas is steadily closing the gap with cities. Rural destinations should prioritise improving digital infrastructure whilst developing capabilities to use emerging technologies such as AI, whilst building digital literacy amongst rural tourism businesses.

# 08.

## **AI Offers a Solution to Increased Digital Visibility for Rural Destinations**

AI is rapidly reshaping how travellers plan trips. For AI to relieve pressure on overcrowded urban centres, rural towns and villages must actively invest in building a strong digital presence and creating comprehensive online content, which will put lesser-known destinations on the map.

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## December 2025

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