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The Rural Tourism Renaissance

Uncovering Europe's Hidden Economic Powerhouse



DIGITAL TOURISM
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Economic development models have largely failed rural areas

Underperforming
Economic & Social Metrics

Ageing Populations &
Outward Migration

Lagging Digital
Infrastructure

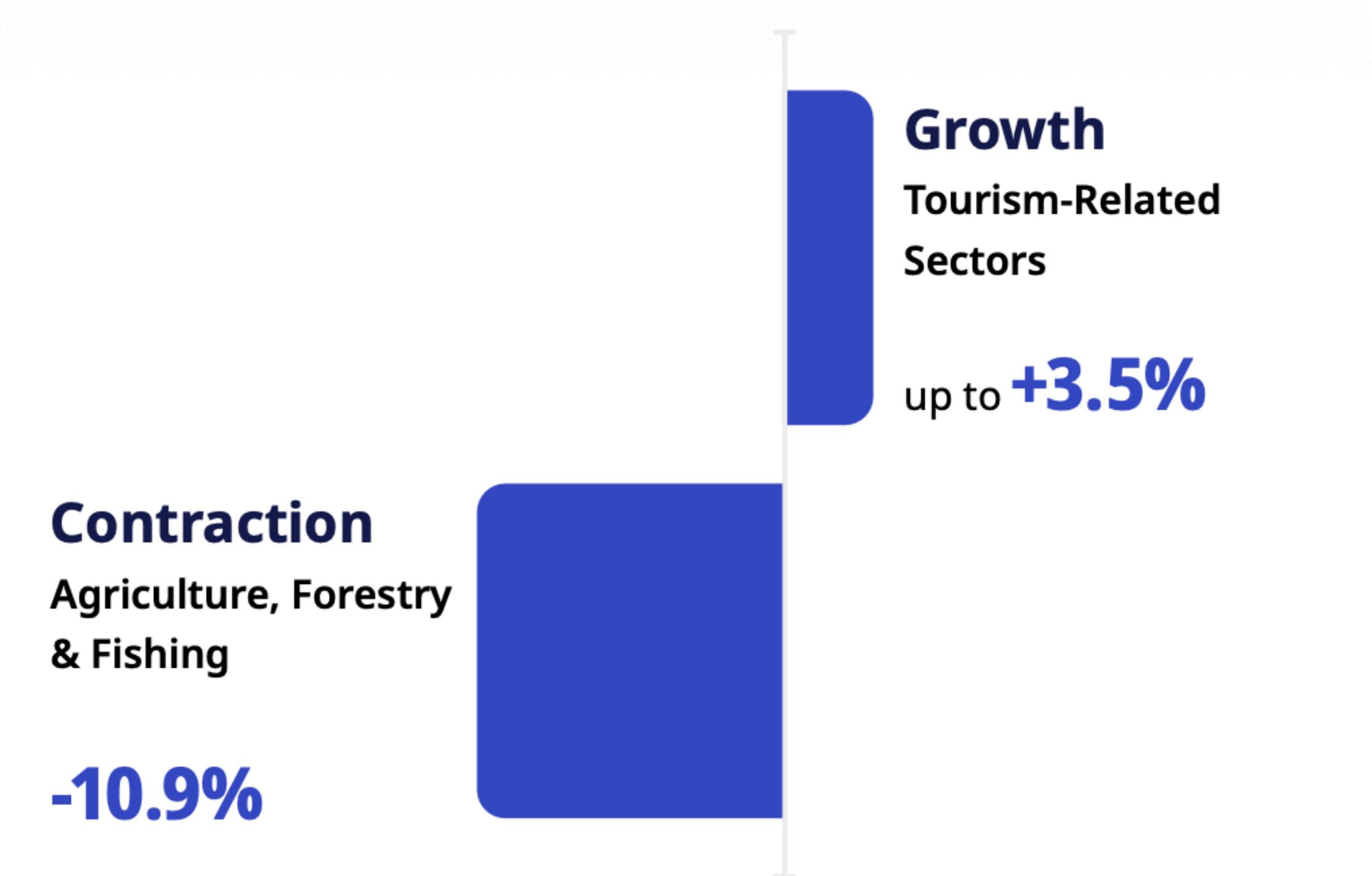
Limited Public
Transport

Rural - Urban
Income Gap

Lack of
investment

Traditional rural industries are in decline, but one sector is growing.

Tourism is the only sector growing in rural Europe



Source: Outlook and Demographic Perspectives for EU's Rural Regions. A Modelling-Based Exercise. European Commission, Joint Research Centre.

Research Methodology

8 Countries

Belgium, France, Germany, Ireland, Italy, the Netherlands, Spain and the United Kingdom.

Airbnb Data Analysis

Search and booking analysis from 2018 - 2024 comparing city, suburban and rural

Secondary Research

National statistics, academic studies, government reports, industry analysis from across Europe.

Some of the key themes that emerged

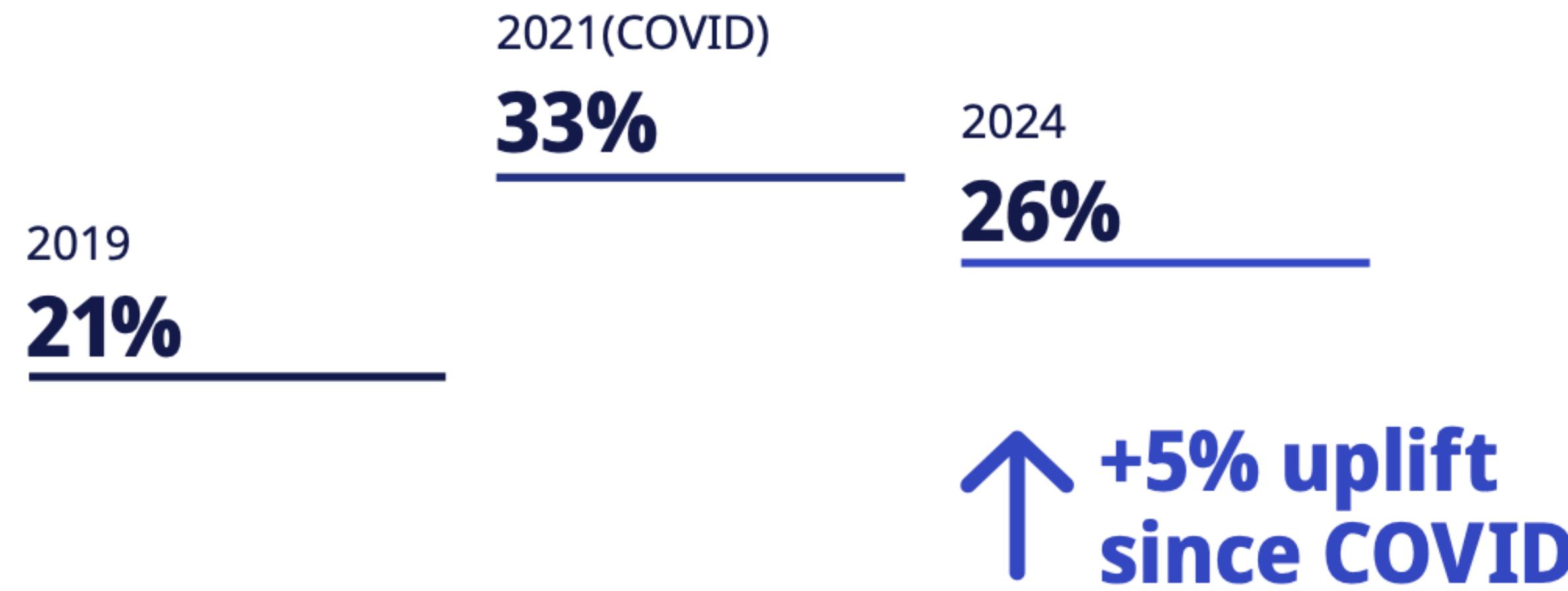
The rural shift

The accommodation gap

Year-round opportunity

Closing the income divide

The Rural Shift



Travellers are choosing rural.

55% of European travellers choosing 'off-the-beaten-track'

Source: European Travel Commission. Europeans Eager to Travel With Growing Interest in Quieter Places.



5 Key Trends Rooted in Rural Experiences

Passion Tourism

The Great Rural Reset

Authentic Luxury

Cultural Heritage Tourism

Rural Microlocations

Passion Tourism

Rural has what cities can't replicate

Aragón's dark skies have driven 830% search growth for the 2026 eclipse.



The Great Rural Reset

Wellness travellers want genuine disconnect

On Ireland's Wild Atlantic Way, seaweed foraging is drawing 75% international visitors year-round.

Hotel investments overwhelmingly focus on cities

82% of chain hotel rooms are located in cities

4% compared to just in rural areas

Source: Une Chambre D'Hôtel sur Deux Appartient à une Chaîne. Insee Première



**Hosts go where hotels won't.
Short-term rentals fill the gap.**

Rural hosts earned €4.06 billion in 2024

Rural host earnings

+162%

Increase in rural guest nights

88%

Growth period measured 2019 - 2024

When Cities Slow Down, Rural Picks up

Rural

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
€173	€167	€164	€160	€161	€159	€159	€159	€163	€167	€172	€174

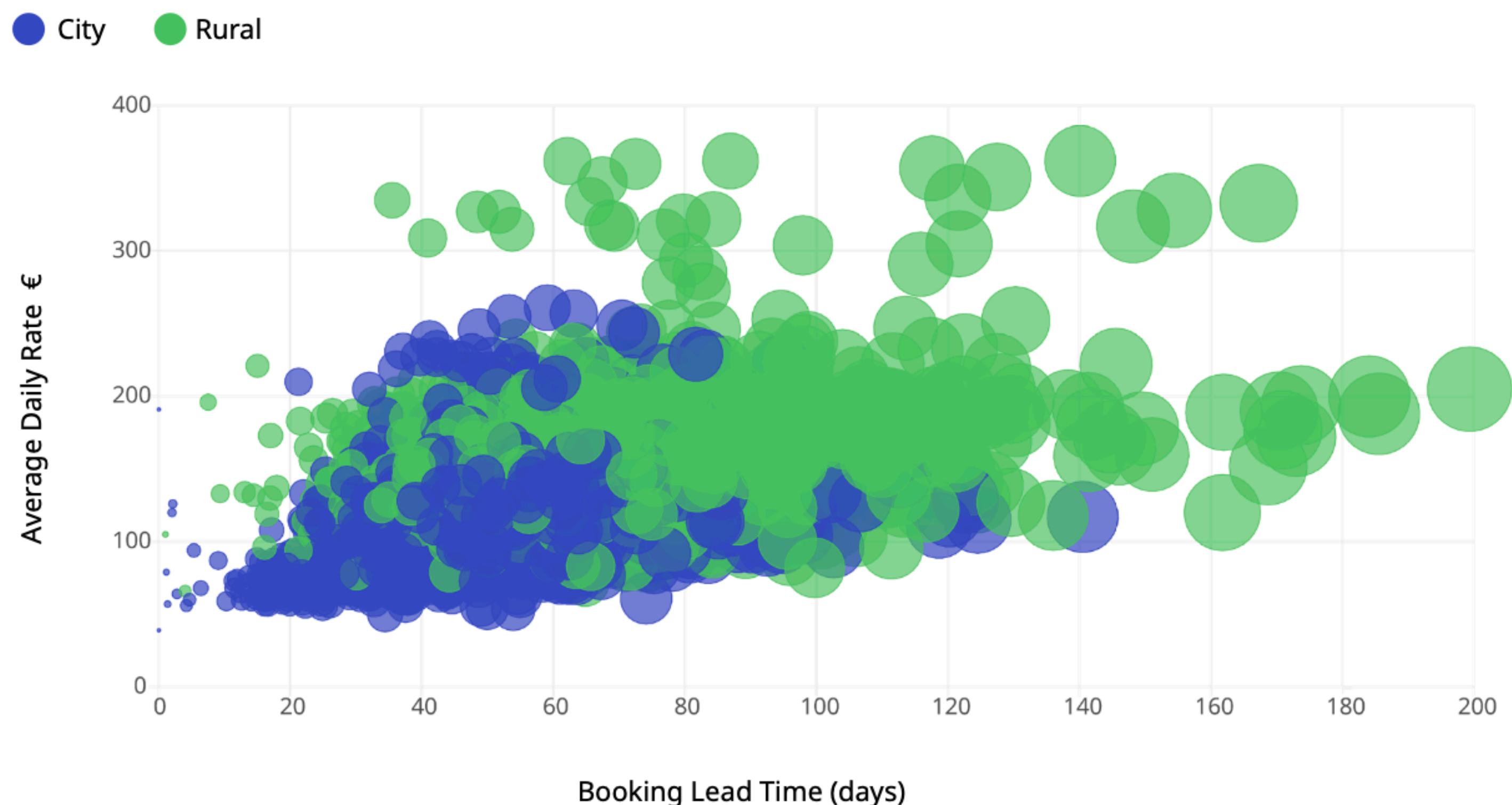
Peak season: Nov-Jan

City

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
€138	€143	€146	€146	€146	€142	€138	€135	€136	€135	€134	€134

Peak season: Mar-May

Rural Attracts the 'Intentional Traveller'



Short-term rentals bridge the rural-urban income gap

Rural Resident Earnings

€18,352

Urban Resident Earnings

€21,136

Source: Eurostat: Urban-Rural Europe - Income and Living Conditions.

Short-term rentals bridge the rural-urban income gap

Rural v.s Urban
Income Gap

€2,800

Typical Rural Host
Earnings

€5,251

↑ 29% income lift
for rural hosts

**Rural tourism is invisible to policymakers,
but increasingly visible to travellers.**

The 8 Key's to Addressing the Rural Tourism Policy Gap

1.

Recognise rural tourism as an economic powerhouse

2.

Destinations should play to their strengths

3.

Target specific audiences and adapt to their needs

4.

STRs are essential for the rural visitor economy

5.

Tailored approaches are needed for unique rural characteristics

6.

Build collaborative regional partnerships

7.

Leverage emerging technologies to compete effectively

8.

AI offers a solution to increased digital visibility for rural destinations

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