Agritourism in Austria

The status quo, trends and challenges

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a 15 minute holiday

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Agritourism, here dubbed ‘farm holidays’, is about

- accommodation, services and hospitality provided by farmers
- a variety of activities
  - direct participation in agricultural activities (e.g. picking the grapes, milking a cow)
  - indirect enjoyment of farm activities (e.g. enjoying meals on site, picking an apple right of the tree, hearing goat bells ringing, watching grazing cows)
  - recreational activities in which the farm nearly provides the landscape (e.g. relaxing from the daily grind in the organic sauna, finding refreshment wandering barefoot through the dewy pastures outside)
  - on-farm accommodations (e.g. bed and breakfast, apartments) and food services

Source: Holidays on the farm (https://www.farmholidays.com/).
Characteristics – ups and downs

evolution over time

<table>
<thead>
<tr>
<th>Year</th>
<th>Farms</th>
<th>Rooms</th>
<th>Farms</th>
<th>Rooms</th>
<th>Farms</th>
<th>Beds</th>
<th>Farms</th>
<th>Beds</th>
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<tbody>
<tr>
<td>1980</td>
<td>28,940</td>
<td></td>
<td>150,494</td>
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<td>1990</td>
<td>21,276</td>
<td></td>
<td>108,896</td>
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<td>1999</td>
<td>15,468</td>
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<td>169,846</td>
<td></td>
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<tr>
<td>2010</td>
<td>9,889</td>
<td></td>
<td>113,714</td>
<td></td>
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</tbody>
</table>

71% guest rooms
45% apartments
68% two seasonal

56% guest rooms
63% apartments
67% two seasonal

Source: Federal Ministry of Agriculture, Forestry, Environment and Water Management (2012), Statistics Austria (different years).
Characteristics – regional statistics of farm holidays 2010

who’s where?

Farm Structure Survey 2010
Number of tourists beds and farms by political district

Percentage of farms with tourist beds and holiday apartments

- 2\% 
- > 2 - 8\% 
- > 8 - 14\% 
- > 14 - 20\% 
- > 20\%

Absolute numbers of farms with tourist beds and holiday apartments

Source: Statistics Austria (2010).
Characteristics – regional statistics of tourism statistics including farm holidays 2010

what’s where?

Percentage of farms with tourist beds and holiday apartments

- < 5.0
- 5.0 - 10.0
- 10.0 - 15.0
- 15.0 - 20.0
- 20.0 -
- >= 20.0

Numbers of farms with tourist beds and holiday apartments on the regional totals of tourism beds

- max. 166,620 (Pinzgau-Pongau)
- Beds (agriculture)
- Other beds

District boarders

Provincial boarders
Characteristics – diversity of offer
spoilt for choice?

- Favorites: vineyards, baby and children
- Special needs
- Getting in touch with uniqueness of farming and nature
- "Natural Experience & Authenticity"

Characteristics - ins and outs
the bottom line

Farm holidays

Farm/ Sector
33% of total operating income of a farm
2.5 % of output value at basic prices (EAA Ø 2007-2017)

Rural Areas
≈ €1 billion turnover p.a.
23,000 secure jobs p.a.
Domino effects

Policy
Improving in quality and diversity
▪ vocational training
▪ funding for technical and construction measures

Market
30% Austrian tourists p.a.
69% of all Austrians are interested

Federal Association Holidays on the Farm (Bundesverband Urlaub am Bauernhof)

putting a label on it

https://www.farmholidays.com/
The Association Holidays on the Farm
statistics 2018

- Members: 2,262 farms with 27,700 beds, on average 12.2 beds per farm
- Occupancy rate: ≈112 fully booked days per year and bed
- Visibility online:
  - 2,131 farms as members with a linked homepage on the association’s web platform
  - 2,216 farms have direct access to the internet
  - 967 farms directly bookable via platform
  - 1,639 farms offering time slots via the ‘digital tourism assistant (DTA)´
  - Ø 6,233 people visiting the association’s website per day
  - 34,545 „likes“ on facebook

General consumer trends
a ‘brave’ new world?

- Rising popularity of short-stay trips and mini vacations (flexibility)
- Authentic and genuine experience (search for meaning)
- Hybrid tourists (the best of both worlds)
- Predictability, control, reliability (product guarantee)
- Everything is digital (booking, advertisement, etc.)

Source: Cluster Urlaub am Bauernhof Österreich (2016), Landwirtschaftskammer Nordrhein-Westfalen (n.d.).
Challenges – agritourism
mutual learning process – advisory task

Where should agritourism go (goals)?

- Develop a culture of entrepreneurship, hospitality, services and recreation
- Use cost accounting and profitability analysis as the basis for pricing and further investments
- Promote the continuous innovation of the farm experience – basic services and (new) additional offers
- Integrate modern consumer needs and desires and use corresponding media
- Strengthen the economic and non-economic benefits for farmers, visitors and communities
Challenges – research
mutual learning process – advisory task

How can the sustainability of farm holidays be assessed within the related value chains?

- Elaborate a more holistic picture of these kinds of businesses
- Develop a framework for systematic analysis and knowledge generation
- Identify the drivers of success and their corresponding potential for innovation
- Investigate the further possibilities and potentials of agritourism
- Establish framework initiatives to support the farmers in their goals
Challenges – synergies
mutual learning process - advisory task

How can one mutually support the other?

- Learn from the benefits of belonging to the association (Bundesverband Urlaub am Bauernhof)
- Exploit the potential for cooperation between farms and other entities
- Balance the competition/cooperation with the tourist industry
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