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UNWTO
World Tourism Organization

TOURISM AND RURAL DEVELOPMENT: A POLICY PERSPECTIVE

*UNWTO Member States Survey on
Tourism for Rural Development*

Tourism and Rural Development: A Policy Perspective

UNWTO Member States Survey on
Tourism for Rural Development

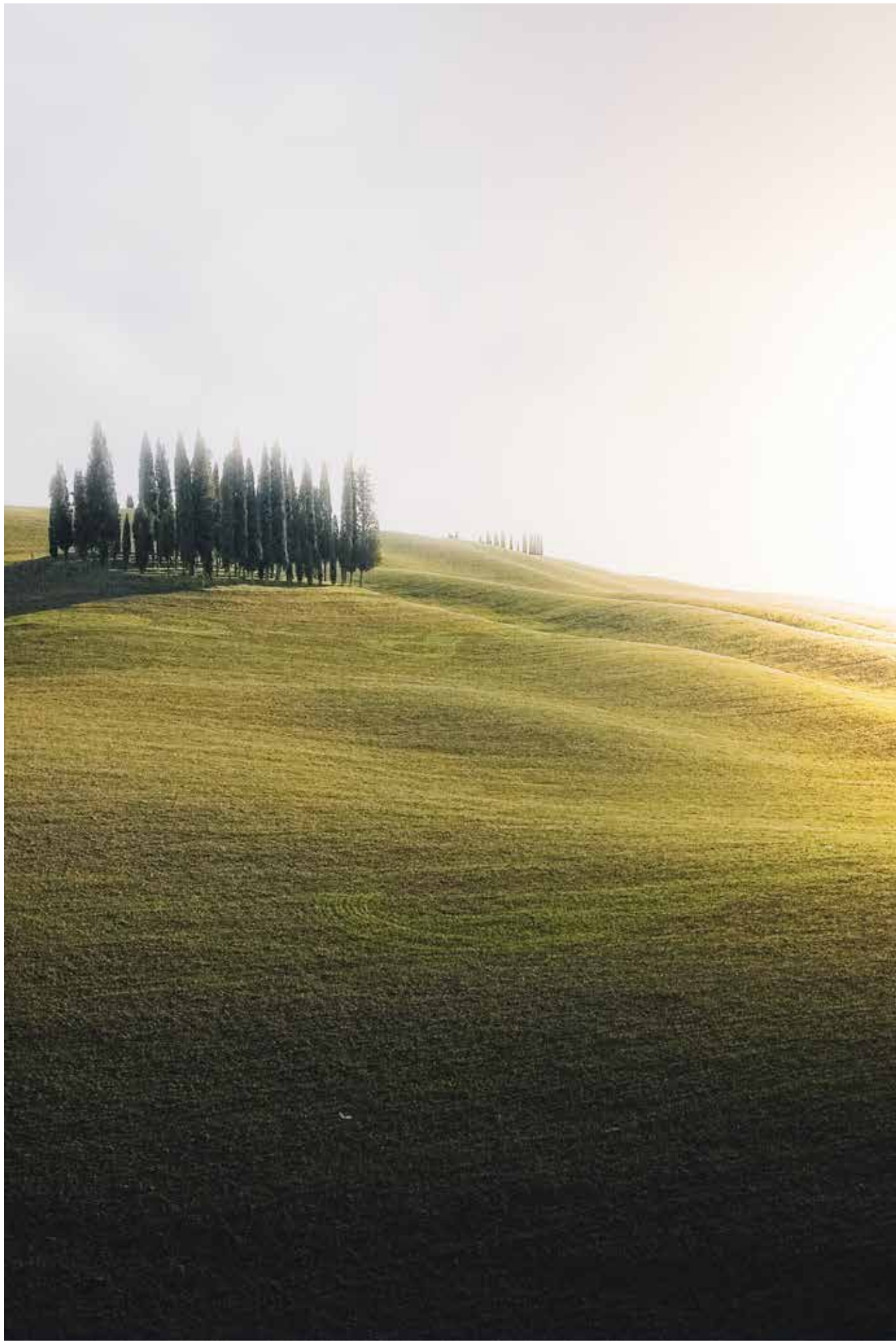


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The publication has been developed by the UNWTO Tourism for Rural Development Programme which is part of the Market Intelligence and Competitiveness Department. The survey has been designed by Patricia Carmona, Juan Carlos Izurieta, Mahmoud Atiya, and Antonio López de Ávila. The report has been prepared by Juan Carlos Izurieta, Mahmoud Atiya and Maulita Sari Hani and revised by Antonio López de Ávila, Coordinator, Tourism for Rural Development Programme and Sandra Carvao, Director, Market Intelligence and Competitiveness Department.

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The editing and proof reading of this document has been conducted by Karen McCabe, Juliana Contreras and Federica Iellici.

For more information about rural tourism visit:
<https://www.unwto.org/rural-tourism>

Foreword

Zurab Pololikashvili
Secretary General
World Tourism Organization



The World Tourism Organization (UNWTO) through its Tourism for Rural Development Programme, seeks to place tourism as a driver to stimulate local economic development, reduce inequalities and empower rural communities.

The positive impact of tourism in rural areas is clear thanks to its direct impact and its unique ability to complement other economic activities, its importance for job creation and for spurring entrepreneurship. Tourism also stands out for its capacity to support the preservation of natural and cultural heritage, as well as deliver economic and social benefits across a wider length of time (fight seasonality) and space (over a wider territory).

To better understand and frame the work of UNWTO in this area, we conducted the first survey on Tourism and Rural Development. The current report serves as a baseline for rural tourism development and policies among UNWTO's Member States and will help **guide our actions and monitor the evolution** of this important agenda.

The report highlights the value placed on rural tourism by Member States. At the same time, it also makes clear the main challenges to its development, including but not limited to issues around infrastructure, depopulation, seasonality or the competitiveness of businesses and products in rural areas.

Members also highlight the opportunities of making tourism in rural areas a driver for the conservation and promotion of cultural and natural resources. As more travelers wish to leave a positive impact on local communities and leave the places they visit better than when they arrived, we will continue to work towards building strong policies that support tourism for rural development.

Executive summary

The current publication highlights how UNWTO member states see the role that tourism holds in promoting rural development, including the challenges and opportunities, as well as the main policies and instruments existing in their countries. The current findings have been compiled from a survey among UNWTO member states which was carried out between October 2022 and January 2023. The results shown in this publication refer to the 79 countries responding to the survey.

The importance of tourism for rural development

Rural tourism is considered a priority for the majority of UNWTO members that responded to the survey. A total of 47 countries (59%) stated that rural tourism is a priority for them while another 29 (37%) consider it an indirect priority whereby countries are developing policies for the sustainable development and management of community-based tourism (CBT). Notably, this specific form of tourism is linked to rural tourism as most of the CBT experiences, products and services are in remote areas.

Rural tourism is a priority for the countries that responded to the survey for several reasons including the fact that it is commonly recognized as a means for rural and sustainable development. Responses highlighted that tourism in rural areas can have a positive impact through benefit-sharing mechanisms along the tourism value chain. Nonetheless, only 20% of the countries surveyed have specific policies and support systems for rural tourism. In comparison, non-specific efforts were applied by almost three quarters of countries surveyed where rural tourism is included in policies and support mechanisms whose principle subject matter relates to another form of tourism e.g., CBT or ecotourism.

In this regard, the specific policy mechanisms that are most common are public investment programmes for rural tourism, present in 22 countries (28%), followed by specific plans or policies for rural tourism, present in 16 countries (20%) that responded to the survey.

Rural tourism policies, either specific or more broadly related, focus mainly on the development and diversification of tourism products and services, the

improvement of infrastructure and support services, education and capacity building and the engagement, empowerment and governance of local communities in working towards achieving sustainability.

Challenges and opportunities

According to the survey, the biggest challenge for rural development through tourism is the infrastructure gap in rural areas. Deficiencies in roads, ports, airports and other infrastructure that allow access to rural areas was the top-ranked challenge for the surveyed countries. The remote nature of many rural areas, alongside difficult terrain conditions amplifies this limitation.

The second highest ranked challenge relates to population and economy, especially depopulation in rural areas as a result of migration to urban regions. Seasonality and product competitiveness add to this challenge, increasing the instability of rural businesses which, in part, prevents the retention of population and human resources.

In this sense, the lack of education and training, as well as skills development, in addition to the capacity to attract and retain workforce talent, were listed in the survey as the third most significant challenge. The existence of training programmes concentrated in cities or larger populations makes it difficult for rural populations to access these opportunities.

Other top-ranked challenges include limitations in accessing or managing financial systems; restrictions in the development of innovative tourism products in rural areas; adverse impacts to and degradation of natural resources; and limitations in handling data, information and knowledge management.

Economic and social-related topics were two of the most frequently recognized opportunities brought by tourism to rural development. Within this spectrum, the creation of new jobs, the improvement of livelihoods and the fighting of depopulation in rural areas were commonly mentioned. Following on from this were opportunities linked to the conservation and promotion of cultural and natural resources.

When asked about the status of rural tourism in the next decade, 47% of the countries responded to the survey foreseeing that rural tourism will be “much better than now”, paired with 49% of responses expecting it to be “better than now”. In total, 96% of all responding countries envision a better outlook for rural tourism in the upcoming decade.

Understanding rural tourism

There is a high consensus among the countries surveyed about UNWTO’s definition of rural tourism. A total of 56 (71%) of the 79 member states answering the survey agreed with the proposed definition. The other 21 countries (27%) agreed to complement it with comments underlining the importance of a wider spectrum of rural related activities and community-based management models.

Overall, data on rural tourism is still scarce with wide variations in terms of the frequency of data availability and areas covered in addition to the methods used for collection and analysis. Nevertheless, 63% of

countries have at least one type of statistics related to rural tourism where the most reported areas include total site visits, overnight stays, and occupancy rate.

Financial and technical limitations are the main reasons behind the scarce availability of rural tourism statistics. In total, 47 countries (59%) stated that the main challenge was the limited budget assigned to this area, closely followed by a lack of available technologies for gathering, processing and analyzing data (44 countries, 56%).



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Methodology

This report is based on a survey conducted by UNWTO among its full member states between October 2022 and January 2023. During this timeframe, 159 countries were full member states of UNWTO.

The survey was conducted using an online form. A PDF version of the survey was also made available to member states in cases where multiple stakeholders from the same country answered different sections. In these cases, partial responses were received by UNWTO and a final consolidated response was uploaded to the online system.

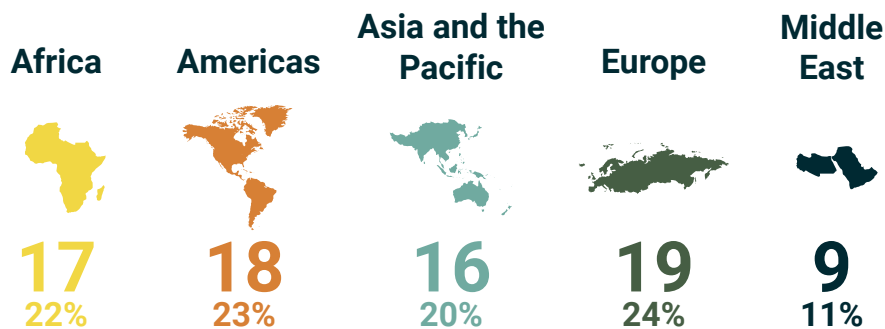
The survey was deployed in four of the UNWTO official languages: Arabic, English, French and Spanish. All responses were translated into English for the analysis.

The questionnaire used for the survey can be found as Annex I in this document.

Conventions used in this report

All percentages used in this document are calculated for total valid responses per question. The number of member states answering each question is shown at the end of each figure. All percentages have been rounded to whole numbers using the closest whole value.

Figure M.1 Countries responding to the survey by region (number of countries, %)



Source: Survey of UNWTO members states on tourism and rural development (2023).

Who responded to this survey?

This report contains the results of responses from 79 UNWTO member states.¹ Per region, Africa registered 17 responses (22% of the total), the Americas 18 (23%), Asia and the Pacific 16 (20%), Europe 19 (24%), and the Middle East 9 (11%).

When classifying responses by Human Development Index (HDI),² 25 responses are from countries with 'very high' HDI (32%), 23 with 'high' HDI (29%), 18 with 'medium' HDI (23%), and 13 from countries with 'low' HDI (16%). Although this results in a good representation across various development levels, it also shows that countries with 'very high' or 'high' HDI may be more advanced in the development of rural tourism and in linking the tourism sector with rural development.

With respect to income,³ 22 responses were registered for countries of the 'high-income' group (28%), 21 for 'upper-middle income' (27%), 26 for 'lower-middle income' (33%), and 10 responses were registered from countries in the 'low-income' group (13%).

Figure M.2 Countries responding to the survey by Human Development Index and income group (number of countries, %)

	Very high	High	Medium	Low
By HDI	25 32%	23 29%	18 23%	13 16%
	High income	Upper-middle income	Lower-middle income	Low income
By income group	22 28%	21 27%	26 33%	10 13%

Source: Survey of UNWTO members states on tourism and rural development (2023).

1 The member states that completed the survey are: Andorra, Armenia, Austria, Bahamas, Bosnia and Herzegovina, Botswana, Brazil, Cambodia, Cape Verde, Chad, Chile, Colombia, Croatia, Cuba, Democratic Republic of the Congo, Djibouti, Dominican Republic, Ecuador, Egypt, El Salvador, Equatorial Guinea, Fiji, Georgia, Greece, Guatemala, Haiti, Honduras, Hungary, Indonesia, Iraq, the Islamic Republic of Iran, Israel, Jordan, Kyrgyzstan, Lao People's Democratic Republic, Lebanon, Lesotho, Madagascar, Malaysia, Maldives, Malta, Mauritius, Mexico, Mongolia, Montenegro, Mozambique, Myanmar, Nepal, Nicaragua, Nigeria, Oman, Panama, Papua New Guinea, Paraguay, Peru, Philippines, Poland, Portugal, Qatar, Romania, Sao Tome and Principe, Saudi Arabia, Sierra Leone, Slovakia, Slovenia, Spain, Syrian Arab Republic, Republic of Korea, Republic of the Gambia, Timor-Leste, Togo, Trinidad and Tobago, Uganda, Uruguay, Uzbekistan, Vanuatu, Viet Nam, Yemen and Zimbabwe.

2 United Nations Development Programme (2022), 'Human Development Index (HDI)' [electronic database], UNDP, available at: <https://hdr.undp.org/data-center/human-development-index> [15-12-2022].

3 World Bank (2022), 'World Bank Country and Lending Groups' [electronic database], available at: <https://datahelpdesk.worldbank.org/knowledgebase/articles/906519-world-bank-country-and-lending-groups> [21-12-2022].

Chapter 1: Setting a common ground – rural tourism definition

About this chapter

From a participatory approach, UNWTO has postulated a definition of rural tourism. This definition comprises a wide spectrum of elements on how visitors experience rural destinations and how this activity supports local economies, social development, and environmental sustainability. This chapter explores how this definition is in line with country particularities and describes further local specificities worth highlighting across regions.

Keywords

Rural tourism, definition, concept

Key messages

- There is an elevated consensus among the countries responding to the survey about the UNWTO definition of rural tourism. A total of 56 out of the 79 responding member states (71%) agreed with the proposed definition.
- Another 21 countries (27%) agreed to complement the definition with comments, underlining the importance of a wider spectrum of rural-related activities and of community-based management models.

1.1 What is rural tourism?

UNWTO defines rural tourism¹³ as “a type of tourism activity in which the visitor’s experience is related to a wide spectrum of products linked to nature activities, agriculture, ways of life and rural cultures, fishing with canes and visiting places of interest. Rural tourism activities take place in non-urban (rural) settings with the following characteristics: 1. low population density, 2. landscapes and land use planning where agriculture and forestry prevail, and 3. social structures and traditional ways of life.”

There is an elevated consensus within countries responding to the survey about this definition with 56 of 79 member states (71%) agreeing with the proposed definition. Another 21 countries (27%) also agreed with this definition, while providing comments on it. Only 2 countries (3%) disagreed with the definition.

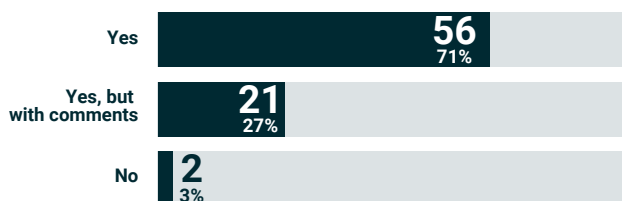
When disaggregating data by region, only countries in the Americas and in Asia and the Pacific reported disagreements with the definition, while countries in Africa showed the highest rate of agreement.

Member states that agreed with the definition while also providing comments, placed particular emphasis on the high diversity and wide spectrum of rural elements that comprise rural tourism in their own territories. Some of these elements include traditional housing and building techniques, local knowledge, handicraft heritage, intangible heritage and local culture such as poetry, arts, singing, storytelling and gastronomy. Additional mentions were the specificities of rural lifestyle on islands, as well as the importance of local community awareness and participation.

Member states that disagreed with the definition pointed out that rural tourism in their territories is highly linked to community-based models, this being the main pillar of their definition of rural tourism.

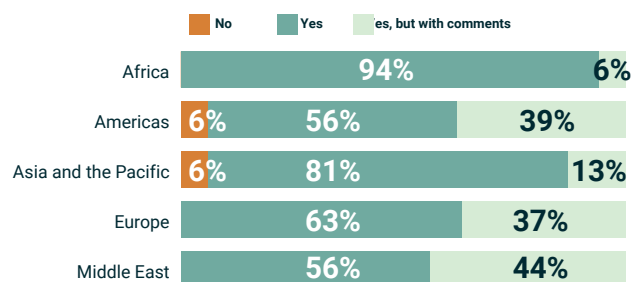
Another area of concern in regard to the proposed definition was the low population density. Some countries stated that the dynamics of rural territories, even under depopulation phenomena, do not always correspond to low population density territories, despite maintaining the core characteristics of rural lifestyle and landscape.

Figure 1.1 Countries’ responses to the question
(number of countries, %)
“Do you agree with the proposed definition of rural tourism?”



Note: 79 member states of 79 answered this question.
Source: Survey of UNWTO members states on tourism and rural development (2023).

Figure 1.2 Countries’ responses to the question by region (%)
“Do you agree with the proposed definition of rural tourism?”



Note: 79 member states of 79 answered this question.
Source: Survey of UNWTO members states on tourism and rural development (2023).

1 World Tourism Organization (2019), *UNWTO Tourism Definitions*, UNWTO, Madrid, DOI: <https://doi.org/10.18111/9789284420858>

Figure 1.3 Countries with a specific definition of rural tourism (number of countries, %)

“Does your country have specific definition for rural tourism?”



Note: 79 member states of 79 answered this question.

Source: Survey of UNWTO members states on tourism and rural development (2023).

A total of 57 of the responding countries (73%) reported that they did not have a specific definition of rural tourism. For the 21 countries (27%) with a specific definition, this was in line with the UNWTO definition, specially highlighting the high diversity of rural lifestyle products and the focus on appreciating and preserving the natural, historical and cultural heritage and maintaining its authenticity.

Forms of community-based management models, collective organizational structures and local distribution of benefits comprise some of the different definitions of rural tourism by countries. In particular, for some countries in the Americas, Asia and the Pacific and Africa, local and indigenous communities are a key element of the rural tourism definition.

In Nicaragua for example, the definition includes rural tourism as a tourism activity management model that allows the design, implementation, management and distribution of benefits by and for the local population. This is done through different organizational structures of a collective nature such as cooperatives, assemblies, communities, associations or groups of families that are in some way associated and that make efficient and balanced use of the country's natural resources.

In Indonesia, rural tourism is defined as an activity that engages with rural communities, seeking benefits and enhancing social wellbeing through its development.

Complementing tourism with other activities in rural landscapes is also highlighted in the various definitions.

Another common theme in the definitions includes the experiential products, authentic experiences and personalized approaches on rural lifestyle and culture, all of which were underlined by Botswana and Slovenia among others.

Some countries such as Andorra do not specifically define rural tourism, but rather other related forms of tourism such as agrotourism, which comprises activities linked to agricultural and livestock production either through the cultivation and production of agricultural and food products, or through the production, breeding and fattening of farm animals.

It is important to mention that even though some countries do not specifically define rural tourism, this form of tourism is in fact part of other definitions.





Figure 1.4 Most frequently used words in definitions of rural tourism in countries responding to the survey



Note: Words excluded in the analysis: *definition, tourist, tourism, be, have and rural.*
 Source: Survey of UNWTO members states on tourism and rural development (2023)

Chapter 2: Policies and support mechanisms for rural tourism

About this chapter

Because of its potential to positively impact local economies, livelihoods and well-being and to support the preservation of cultural and natural heritage, countries have prioritized the development of sustainable tourism in rural areas. Governments and local authorities are motivated towards the development of this agenda and have thus created policies and incentives in support of its development including investment opportunities, improvements of infrastructure, and the promotion of entrepreneurship.

Keywords

Rural tourism, policy, support mechanisms, investment, entrepreneurship, good practices, planning, fiscal, employment.

Key messages

- Rural tourism is a priority for the countries responding to the survey. In total, 47 of the responding countries (59%) identified rural tourism as a direct priority, while another 29 countries (37%) stated that it is an indirect priority meaning that rural tourism is part of efforts in other tourism segments such as CBT or ecotourism.
- Among the reasons why rural tourism is a priority, responding countries said that it was linked to rural and sustainable development. Responses highlighted how rural tourism can have positive impacts through benefit-sharing mechanism along the tourism value chain.
- Almost 25% of the responding countries have specific policies and support systems for rural tourism. If the indirect efforts are considered, almost three quarters of the responding countries have developed policies and support mechanisms for rural tourism.

2.1 Is rural tourism a priority for countries?

Most responding countries prioritize rural tourism either in direct or indirect forms. In total, 47 countries (59%) stated that rural tourism is a direct priority for them. Another 29 countries (37%) prioritize rural tourism indirectly, meaning that rural tourism is part of efforts in other tourism segments such as CBT or ecotourism. Only 3 countries (4%) have not listed rural tourism as part of their current priorities.

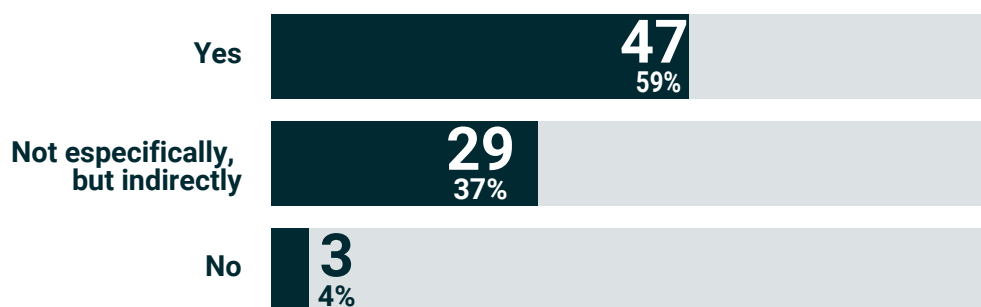
The majority of the countries answered that rural tourism prioritization is part of a bigger agenda related to tourism and rural development. Additionally, rural tourism is often listed as one of several tourism segments to be further developed in the framework of a wider national tourism plan.

Rural tourism is frequently mentioned as a means for rural and sustainable development. In Mexico, for example, rural tourism development is set to generate positive impacts for the sustainable development of rural regions. In Portugal, rural tourism is defined in the national action plan as a key instrument to prioritize rural development. In Indonesia, “tourism villages”, a concept that comprises rural tourism, consists of developing villages in an integrated manner in order to achieve social transformation, village culture and a sustainable economy.

Rural landscapes are part of natural settings, both geographically and conceptually. Therefore, rural tourism is commonly mentioned as part of the nature-oriented prioritized efforts. For example, in Georgia, rural tourism is included in the ecotourism agenda. In Lebanon, rural tourism is part of the sustainable tourism strategy for the country’s mountains while, in Israel, rural tourism is considered as a component of community living within or around natural areas and national parks ultimately making its development part of the agenda for the protection of natural areas. Under the Portuguese Tourism Strategy 2027, rural tourism is a priority which values territories and communities. Rural tourism is considered key to enhancing territorial development by allowing visitors to enjoy historical and cultural heritage and to contribute to the preservation of its authenticity.

The importance and purpose of rural tourism among the countries that responded to the survey is highly diverse. Among the higher priorities in the rural tourism agenda is the need to increase, diversify and decentralize economic benefits for rural communities.

Figure 2.1 Countries’ responses to the question by region (%)
“Is rural tourism part of the priorities established in tourism planning in your country?”



Note: 79 member states of 79 answered this question.

Source: Survey of UNWTO members states on tourism and rural development (2023).

Responding countries commonly mentioned how rural tourism can have a positive impact through benefit-sharing mechanisms along the tourism value chain. As part of the reasons for prioritizing rural tourism, countries explained that because of the intrinsic nature of rural tourism, which allows visitors to get in direct contact with local entities and to participate in a wide range of local events related to culture, nature, farming, and agriculture, it plays a key role in how benefits are shared throughout all stakeholders.

Other elements that are prioritized within rural tourism or related agendas included:

- Improving the competitiveness of rural destinations and the experience of visitors;
- Diversifying the set of existing products and routes in rural areas. Important mentions were given to new markets opportunities after the COVID-19 pandemic;
- Creating and improving regulatory frameworks to better plan and manage rural tourism development;
- Improving governance through the creation or strengthening of decentralized forms of administration, highlighting the importance of enhancing collective and local forms of management and decision-making processes;
- Improving infrastructure, basic services, and accessibility thereby reducing the physical barriers in order to improve the tourism experience whilst also upgrading rural living conditions;
- Supporting the national development finance institutions (DFIs) and financial institutions; creating, optimizing or increasing investment policies and funding; and encouraging investment partnerships.

2.2 What are countries doing to enhance rural development through tourism?

Most popular among responding countries are public investment programmes in rural tourism. A total of 22 countries (28%) mentioned having specific public investment programmes for rural tourism. Another 30 countries (38%) mentioned having other forms of investment programmes albeit not specifically for rural tourism but somehow linked with and beneficial to rural tourism. In total, directly or indirectly, 52 of the responding countries (66%) have public investment programmes for rural tourism in place.

The second most common mechanism of support for rural development and tourism is quality standards for tourism products in rural areas with 21 countries (27%) having specific norms for rural products and 36 countries (46%) having more general norms linked to rural activities. When combined, 72% of the countries answered having either dedicated or linked quality standards for tourism products in rural areas.

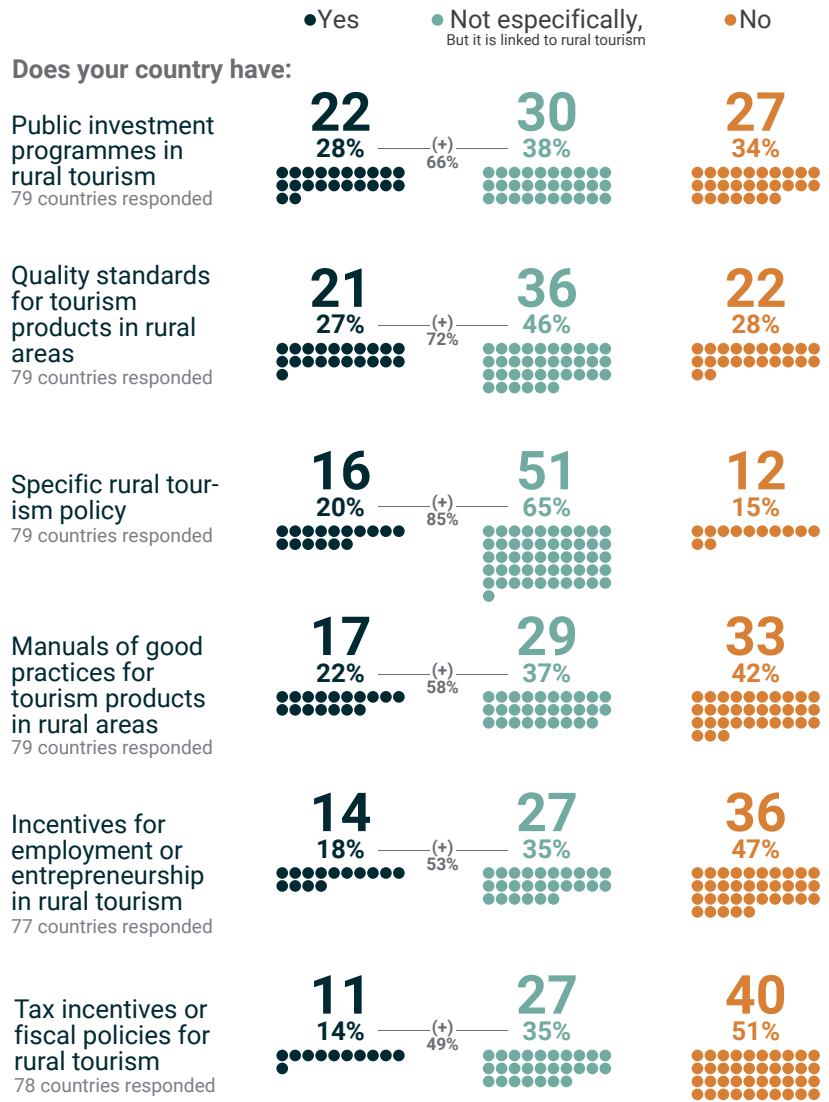
Only 16 countries (20%) responded to having a specific rural tourism policy. Nevertheless, as seen in previous sections of this publication, the complexity and connectivity of rural tourism with other forms of tourism explains why most countries include rural tourism within wider tourism plans and policies. In line with this, despite 51 countries (65%) not having a specific rural tourism policy, rural tourism is still embedded in other policy efforts (see box 2.1).

Incentives for employment or entrepreneurship and tax incentives applied specifically to rural tourism are the mechanisms adopted by the smallest number of countries.

Countries were also asked to mention other support mechanisms related to rural tourism. Those most frequently reported include programmes on training and capacity building (56 countries, 71%), education (35 countries, 44%), and financial assistance services (33 countries, 42%).

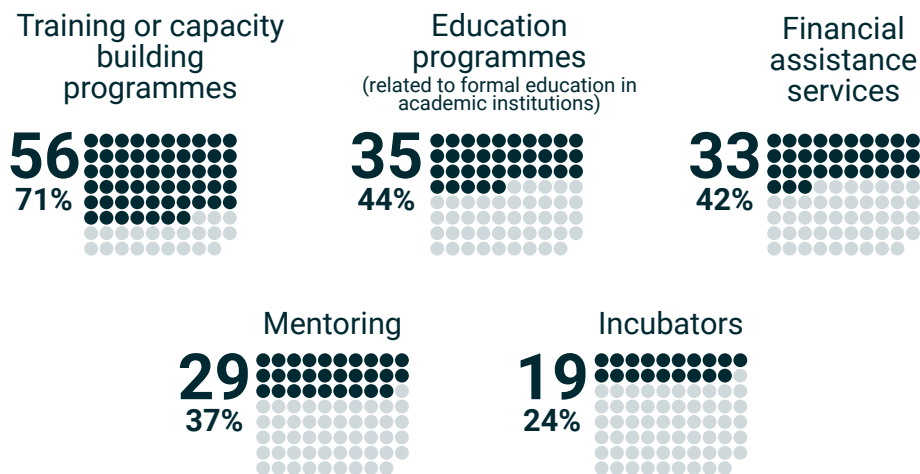
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Figure 2.2 Presence of mechanisms and policies for tourism and rural development (number of countries, %)



Note: Multiple responses were possible.
Source: Survey of UNWTO members states on tourism and rural development (2023).

Figure 2.3 Presence of support systems that are related to rural tourism (number of countries, %)
“Does your country have any of the following support systems that are related to rural tourism?”



Note: 79 member states of 79 answered this question.
Source: Survey of UNWTO members states on tourism and rural development (2023).

Feature box 2.1

What is the aim of rural tourism policies and investment among responding countries?

Rural tourism policies in the countries that responded to the survey cover a wide spectrum of approaches and areas of impact. These policies commonly include effective management and preservation of natural and cultural resources, as well as the creation of economic and social benefits for rural populations.

Mentioned policies are also related to the development and transformation of rural tourism destinations, highlighting the need for developing better and more authentic tourism experiences in rural areas, based on the creation of innovative business models, the enhancement of capacity building, and the improvement of marketing strategies, with special emphasis on the use of digital tools.

Additionally, improving governance, strengthening and implementing institutional and legal frameworks, financing and improving administrative and management competencies, as well as encouraging the formalization of local tourism businesses are often mentioned as part of the countries' policies. Moreover, frequent mention is given to the idea of prioritizing the involvement and participation of communities in managing and developing tourism and to the importance of their own empowerment.

Although not as common (and considering this lies outside of the framework of tourism-related administrations), the development of infrastructure and facilities to improve accessibility and connectivity, as well as improving access to financial mechanisms, are stated to be part of the agenda for rural tourism development.

The most common elements covered by the national plans and policies for rural tourism or related policies include:

Development and diversification of tourism products and services:

- Development of attractive and authentic tourism products in rural destinations;
- Development of innovative business models and improvement of the business environment;
- Social responsibility and entrepreneurship;
- Strengthening leadership and empowerment of rural tourism entrepreneurs;
- Promotion of agrotourism, traditional cuisine and outdoor tourism related activities;
- Creating local tourist information centers and promoting alternative lodgings;
- Promoting the use of digital forms of marketing and networking.

Improving infrastructure and support services

- Improvement of infrastructures in particular roads and facilities to increase accessibility;
- Improvement of health services;
- Development and support of financial services;
- Improvement of safety and security;
- Improvement and installment of digital infrastructure in rural destinations.

Education, training and capacity building

- Improvement of education facilities for local communities;
- Promotion and enhancement of training and capacity building initiatives;
- Skills development for local communities in digital tools.

Sustainability

- Promotion of economic, social and environmental development of rural areas;
- Preservation and promotion of cultural and natural resources and rural heritage;
- Respect for the authenticity of host communities and their intangible heritage;
- Focus on the quality of life of rural populations and optimal use of natural resources.

Engagement and empowerment of local communities

- Involvement of local communities in planning, decision-making and development of tourism;
- Empowerment of rural populations;
- Strengthening leadership and empowerment of rural tourism entrepreneurs and MSMEs;
- Improvement of intercultural understanding and tolerance;
- Sustainable and community-based tourism development;
- Improvement of competitiveness and marketing strategies through digital tools.

Local governance

- Implementation of institutional and legal frameworks for promoting rural tourism;
- Strengthening of administrative and management competencies;
- Encouragement of formalization for local tourism companies;
- Support for rural tourism development through investment incentives, subsidies and technical advice;
- Supporting and financing rural tourism administrative units.

What do public investment programmes in rural tourism cover?

Of the 79 responding countries, 52 reported having public investment programmes directly or indirectly related to rural tourism. According to the findings, rural infrastructure development is the key area of attention for investment initiatives. Another frequent investment focus is on boosting competitiveness, entrepreneurship and promotion of rural destinations, especially focusing on developing new authentic tourism products.

Part of the investment programmes were found to be linked with although not entirely dedicated to tourism. Common mentions were on funding other economic activities complementary to tourism, especially agriculture, livestock and other farming activities which are at the core of the rural landscapes.

Chapter 3: Challenges and opportunities for tourism as a driver for rural development

About this chapter

Economic and social gaps affect rural landscapes worldwide. These are often enhanced by geographical and other conditions, which bring a wide range of challenges for tourism as a driver for the development of rural areas. On the other hand, experiences across regions are demonstrating the transformative force of tourism and its key role in the development of rural areas not only by improving economic and social development but also for the conservation and promotion of natural and cultural heritage.

Keywords

Challenges, opportunities, economy, social, environmental, cultural, natural, livelihoods, heritage, infrastructure, connectivity, digitalization, jobs, tourism products

Key messages

- According to responding countries, the biggest challenge for rural development through tourism is the infrastructure gap in rural areas.
- The second top-ranked challenge relates to population and economy, especially depopulation in rural areas, frequently linked to migration to urban areas.
- Economic and social related topics were most frequently recognized as some of the opportunities brought by tourism to rural development. These include opportunities for the creation of jobs, the improvement of livelihoods and in fighting depopulation.
- Opportunities linked to the conservation and promotion of cultural and natural resources earned the next most frequent mentions.

3.1 What are the main challenges for rural development through tourism?

The countries surveyed were given a list of seven pre-defined challenge groups (topics) to be ranked 1 to 7, with 1 being the highest priority for their country in terms of rural development through tourism. No two topics in the following list can occupy the same rank:

1. Infrastructure;
2. Population and economy;
3. Human resources and training;
4. Governance and financial mechanisms;
5. Destinations, tourism products and business environment;
6. Natural and cultural resources;
7. Digitalization and information technologies.

'Infrastructure' is the top-ranked topic for the countries surveyed with 32 countries listing it as their top priority. 'Population and economy' is the second top-ranked topic with 10 such mentions, followed by 'human resources and training' (9 countries), 'governance and financial mechanisms' (8 countries), 'destinations, tourism products and business environment' (8 countries), 'natural and cultural resources' (7 countries) and 'digitalization and information technologies' (2 countries).

'Infrastructure' is also the second most important priority for most countries, with 17 responses, followed by 'governance and financial mechanisms' (14 countries) and 'digitalization and information technologies' (11 countries).

Figure 3.1 Priorities of challenge topics (number of responses)



Notes: 76 member states out of 79 answered this question.

Ranks were possible from 1 to 7, with 1 being the highest priority where no two topics held the same rank.

Source: Survey of UNWTO members states on tourism and rural development (2023).

The priorities given the lowest rank were ‘destinations, tourism products and business environment’ (14 countries), ‘natural and cultural resources’ (13 countries) and ‘human resources and training’ (12 countries).

When disaggregated by region and considering the number of countries that ranked each topic as their highest priority, ‘infrastructure’ is still the predominant priority across regions, again followed by ‘population and economy’.



Figure 3.2 Top-ranked challenge topics by region

	Priority rank 1 is the highest priority		
	1	2	3
Africa	Infrastructure	Human resources and training	Destinations, tourism products, and business environment
Americas	Infrastructure	Population and economy	Natural and cultural resources
Asia and the Pacific	Infrastructure	Natural and cultural resources	Destinations, tourism products, and business environment
Europe	Infrastructure	Population and economy	Governance and financial mechanisms
Middle East	Governance and financial mechanisms	Population and economy	Infrastructure

Notes: 76 member states out of 79 answered this question.

Ranks were possible from 1 to 7, with 1 being the highest priority where no two topics held the same rank.

Topics were ordered by countries ranking the highest priority on each topic. In case of a tie, the topic with the most countries in the following rank is shown.

Source: Survey of UNWTO members states on tourism and rural development (2023).

3.2 What are the challenges within each topic?

Each topic comprised a pre-set list of common challenges presented to the countries in order to complete their rankings. Countries were asked to rank the priority of each challenge affecting the development of rural areas through tourism.

3.2.1 Infrastructure

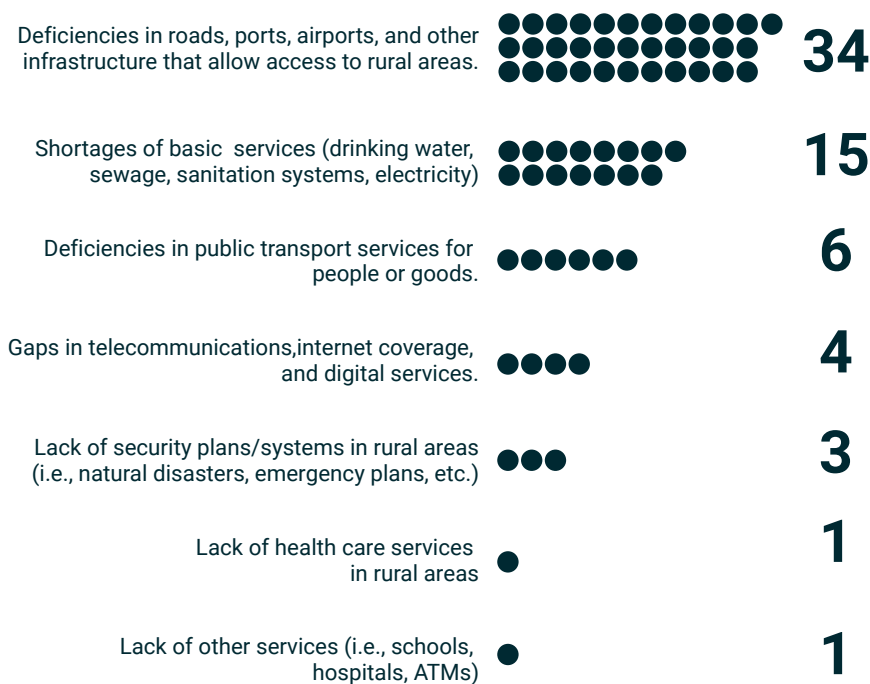
Under the 'infrastructure' topic, seven challenges were listed:

1. Deficiencies in roads, ports, airports and other infrastructure that allow access to rural areas;
2. Shortage of basic services (including drinking water, sewage, sanitation systems and electricity);

3. Deficiencies in public transport services for people or goods;
4. Gaps in telecommunications, Internet coverage and digital services;
5. Lack of security plans/systems in rural areas (i.e., natural disasters, emergency plans, etc.);
6. Lack of health care services in rural areas;
7. Lack of other services (i.e., schools, hospitals, ATMs, etc.)

'Deficiencies in roads, ports, airports and other infrastructure that allow access to rural areas' was the top-ranked challenge, with 34 countries ranking it as the most significant. For 15 countries, the second most important challenge was the 'shortage of basic services (including drinking water, sewage, sanitation systems and electricity)'.

Figure 3.3 Challenge priorities within the topic of 'infrastructure' (number of countries assigning #1 priority to each challenge)



Note: 75 member states out of 79 answered this question.

Ranks were possible from 1 to 7, with 1 being the highest priority where no two topics held the same rank.

Source: Survey of UNWTO members states on tourism and rural development (2023).

Outside of the framework of the ranked challenges, countries reported that the remote nature of rural areas, which often have limited access due to poor terrain conditions or location can worsen their accessibility even further.

Alongside these challenges, gaps in the connectivity and digital dimensions were also evaluated under the digitalization and information technologies topic, results of which are shown in section 3.7.1 Digitalization and information technologies. The need to improve the accessibility to Internet services and digital technologies is a particular concern for the countries surveyed. Such limitations can be overcome by implementing infrastructural advancements.

3.2.2 Population and economy

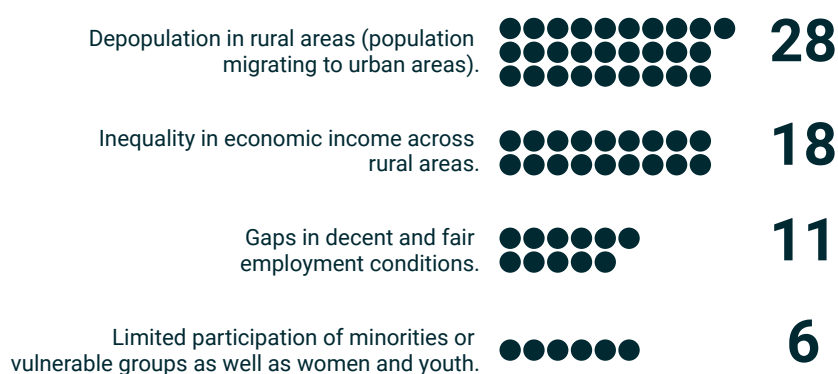
Within the 'population and economy' topic, countries were requested to rank the following four challenges:

1. Depopulation in rural areas (population migrating to urban areas);
2. Inequality in economic income across rural areas;
3. Gaps in decent employment conditions;
4. Limited participation of minorities or vulnerable groups, as well as women and youth.

'Depopulation in rural areas', often linked with migration to urban areas, was the top-ranked challenge, with 28 countries identifying it as a top priority for rural development through tourism. 'Inequality in economic income across rural areas' was the second most important challenge.

Aside from the pre-set challenges, countries also mentioned seasonality-related labour instability as a significant hurdle, particularly for some specific rural areas. In this regard, the issue of instability or incapacity of rural businesses in paying attractive salaries to their personnel and executives was raised by the responding countries.

Figure 3.4 Challenge priorities within the topic 'population and economy' (number of countries assigning #1 priority to each challenge)



Notes: 70 member states out of 79 answered this question.

Ranks were possible from 1 to 4, with 1 being the highest priority and where two topics held the same rank.

Source: Survey of UNWTO members states on tourism and rural development (2023).

3.2.3 Human resources and training

Only two challenges were included under the 'human resources and training' topic:

1. Lack of skills development in addition to attracting and retaining workforce talent;
2. Lack of adequate training and education programmes.

The highest ranked was the 'lack of skills development in addition to attracting and retaining workforce talent', followed by the 'lack of adequate training and education programmes'.

In this section, countries have identified other related challenges and limitations. These include the limited availability of qualified trainers and the lack of training in specific areas such as innovation, entrepreneurship, tourism management skills, business planning, marketing and sustainability. Some also emphasize the need for language training specifically for tourism-related services.

Figure 3.5 Challenge priorities within the topic 'human resources and training' (number of countries assigning #1 priority to each challenge)



Note: 70 member states out of 79 answered this question.

Ranks were possible from 1 to 2, with 1 being the highest priority where no two topics held the same rank.

Source: Survey of UNWTO members states on tourism and rural development (2023).

3.2.4 Governance and financial mechanisms

In the topic category of ‘governance and financial systems’, responding countries prioritized among seven challenges:

1. Limitations in access or management of financial systems;
2. Lack of public or private-community partnerships;
3. Lack of appropriate planning and sustainable development instruments;
4. Lack of a tourism-dedicated management structure/person;
5. Lack of multi-level governance;
6. Lack of appropriate and consistent monitoring systems;
7. Lack of engagement amongst residents and communities in the consultative process

The ‘limitations in access or management of financial systems’ was the top-ranked challenge closely followed by the ‘lack of public-private-community partnerships’, the ‘lack of appropriate planning and sustainable development instruments’ and the ‘lack of a tourism-dedicated management structure/person’. Comments related to limitations not included within the challenges include the need for stronger institutions in rural areas, as well as dedicated or enhanced plans, policies, frameworks and standards for rural tourism. The need for community engagement was also mentioned as an important factor for proper governance systems in rural areas.

Figure 3.6 Challenge priorities within the topic ‘governance and financial mechanisms’ (number of countries assigning #1 priority to each challenge)



Notes: 73 member states out of 79 answered this question.

Ranks were possible from 1 to 7, with 1 being the highest priority where no two topics held the same rank.

Source: Survey of UNWTO members states on tourism and rural development (2023).

3.2.5 Destinations, tourism products and business environment

Seven challenges fell under the ‘destinations, tourism products and business environment’ category:

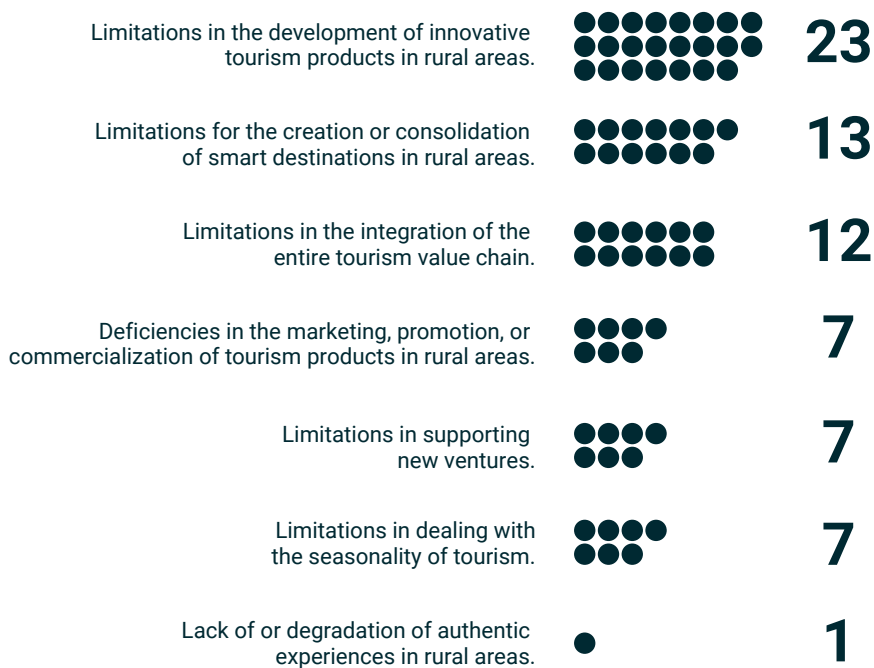
1. Limitations in the development of innovative tourism products in rural areas;
2. Limitations in the creation or consolidation of smart destinations in rural areas;
3. Limitations in the integration of the entire tourism value chain;
4. Deficiencies in marketing, promotion or commercialization of tourism products in rural areas;
5. Limitations in supporting new ventures;
6. Limitations in dealing with the seasonality of tourism;
7. Lack or degradation of authentic experiences in rural areas.

For 23 countries the ‘limitations in the development of innovative tourism products in rural areas’ is the top

challenge amongst the wider ‘destinations, tourism products and business environment’ topic. Results show ‘limitations for the creation or consolidation of smart destinations in rural areas’ and ‘limitations in the integration of the entire tourism value chain’ as the second most important challenges.

Complementary comments from the respondent countries mostly referred to the lack of tourism-related leaders in decision-making processes along with the non-prioritization of tourism that also has a negative impact on the competitiveness of rural destinations. Furthermore, in some countries, there has been a historical imbalance between promotional tools and destination management tools where the primary focus relates to positioning strategies thereby overlooking sustainable development. There is a need for communities to be more aware of and committed to the preservation of natural and cultural heritage. Additionally, reporting countries highlighted that high levels of motivation are a key requirement towards learning and skills development which can support the development of an efficient tourism business environment in the community.

Figure 3.7 Challenge priorities within the topic ‘destinations, tourism products and business environment’
(number of countries assigning #1 priority to each challenge)



Note: 73 member states out of 79 answered this question.

Ranks were possible from 1 to 7, with 1 being the highest priority where no two topics held the same rank.

Source: Survey of UNWTO members states on tourism and rural development (2023).

3.2.6 Natural and cultural resources

The ‘natural and cultural resources’ topic was composed of five challenges:

1. Risks, impacts and/or degradation of natural resources;
2. Limitations in residents’ awareness about the preservation of natural or cultural heritage;
3. Risks, impacts and/or degradation of cultural resources;
4. Conflicts in the use of resources, land tenure and accessibility to housing;
5. Deficiencies regarding the efficient use of energy resources, water or other natural resources;
6. Waste management.

Responses by countries highlighted a higher concern for risks, impacts and degradation of natural resources in comparison to the cultural sphere. Almost twice the number of countries ranked the risks to natural resources as a top priority in comparison to those ranking the risks to cultural resources.

‘Limitations in residents’ awareness about the preservation of both natural or cultural heritage’ was ranked second among the responding countries.

Figure 3.8 Challenge priorities within the topic ‘natural and cultural resources’ (number of countries assigning #1 priority to each challenge)



Notes: 75 member states out of 79 answered this question.

Ranks were possible from 1 to 6, with 1 being the highest priority where no two topics held the same rank.

Source: Survey of UNWTO members states on tourism and rural development (2023).

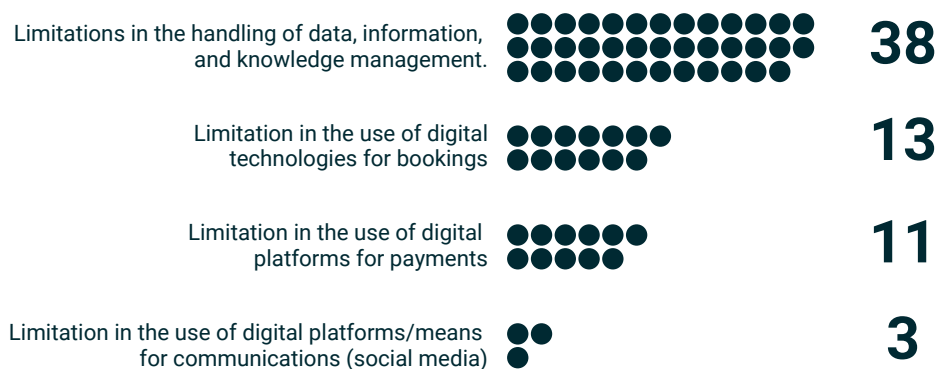
3.2.7 Digitalization and information technologies

Under this topic, country participants were asked to prioritize the following four challenges from the most to least significant challenge:

1. Limitations in the handling of data, information and knowledge management;
2. Limitations in the use of digital technologies for bookings;
3. Limitations in the use of digital platforms for payments;
4. Limitation in the use of digital platforms/means for communications (social media).

‘Limitations in the handling of data, information and knowledge management’ was the number one-ranked challenge in the ‘digitalization and information technologies’ topic. Other pre-set challenges were related to the use of different technologies however, it is worth mentioning that complimentary comments from countries pointed to the importance of closing gaps in digital literacy throughout rural communities in addition to improving the accessibility to Internet services and digital technologies.

Figure 3.9 Challenge priorities within the topic ‘digitalization and information technologies’ (number of countries assigning #1 priority to each challenge)



Notes: 68 member states out of 79 answered this question.

Ranks were possible from 1 to 4, with 1 being the highest priority where no two topics held the same rank.

Source: Survey of UNWTO members states on tourism and rural development (2023).



Feature box 3.1

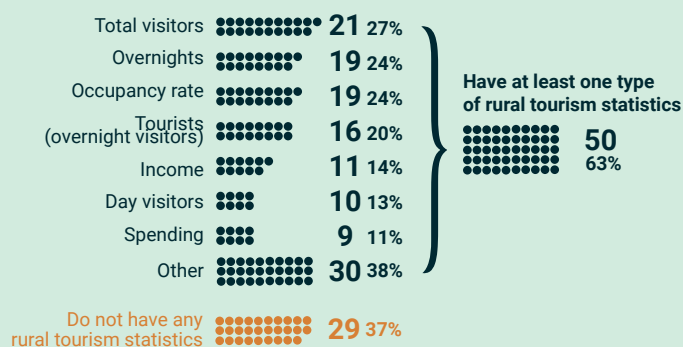
How available is rural tourism data?

Rural tourism statistics are still scarce among countries that responded to the survey. Out of 79 countries, 21 (27%) reported having statistics on the total number of visitors to rural areas, 19 countries (24%) have statistics on overnight stays and occupancy rates, 16 (20%) on overnight visitors, 11 (14%) on income, 10 (13%) on day visitors and 9 (11%) on spending. Additionally, 30 countries reported having other types of statistics on rural tourism or other similar forms of tourism that encompass rural tourism.

When combined, 50 countries out of 79 (63%) have at least one type of statistic related to rural tourism, but these vary highly in type, methods, as well as in geographical coverage and the frequency of data availability. 29 countries (37%) do not have any kind of specific statistics available for rural tourism or other similar forms of tourism that could encompass rural tourism.

Figure 3.10 Available rural tourism statistics by type
(number of countries, %)

“Specifically for rural tourism, select the data you have available in your country.”



Notes: 79 member states out of 79 answered this question.
Multiple responses were possible.

Source: Survey of UNWTO members states on tourism and rural development (2023).

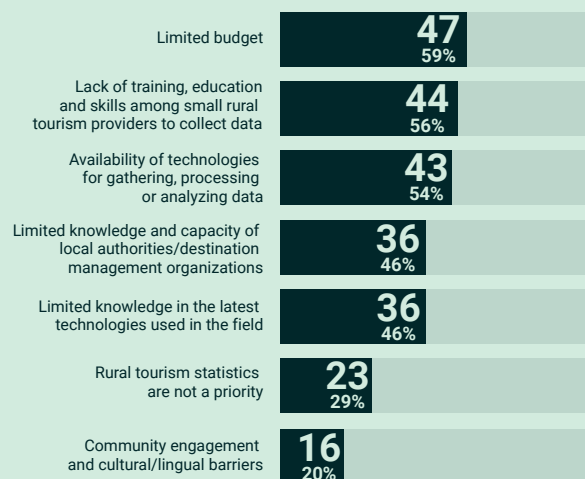
Financial and technical limitations are the main reasons behind the scarce availability of rural tourism statistics. When asked about the challenges faced upon collecting rural tourism data, most countries (47 countries, 59%) stated that the main challenge is the limited budget allocated to this area, closely followed by the availability of technologies for gathering, processing or analyzing data (44 countries, 56%). The lack of training, education and skills among small rural tourism providers to collect data was set as the third main challenge. Some countries also pointed to limitations in local governance and organizational capacities in some communities, which poses challenges towards the coordination needed to collect data in an appropriate manner.

For some countries, tourism statistics in general are generated at the national level or by large-scale transportation companies with reduced capacity at local levels. Therefore, these countries have limitations in gathering compelling information throughout the commonly dispersed rural destinations. Some countries mentioned that current regulations and systems have limitations in distinguishing between tourism service providers' turnover from the traditional rural economic activities, therefore hindering the proper estimate of the economic impact of tourism in rural areas.

In line with the overall limitations related to collecting data for rural tourism, when asked about the current support needed for collecting and analyzing data for rural tourism, most responding countries (54 countries, 73%) reported the need for both financial support and technical assistance.

Figure 3.11 Challenges for collecting rural tourism data (number of countries, %)

“What are the challenges you face when collecting rural tourism data?”

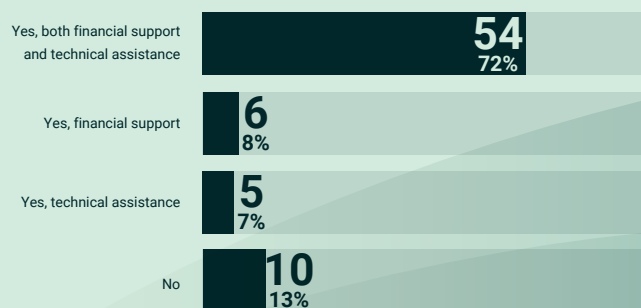


Note: 75 member states of 79 answered this question.

Source: Survey of UNWTO members states on tourism and rural development (2023).

Figure 3.12 Support or assistance needed for gathering rural tourism statistics (number of countries, %)

“Do you need financial support or assistance in collecting and analyzing data for rural tourism?”



Note: 75 member states of 79 answered this question.

Source: Survey of UNWTO members states on tourism and rural development (2023).

3.3 What are the main opportunities for rural development through tourism?

Surveyed countries were asked to identify the main opportunities that tourism could bring to rural development in their territories. Due to the open-ended nature of this question, countries were free to highlight a vast range of opportunities.

When grouped by category, 37% of the topics identified were related to opportunities in economic and social dimensions. The 'creation of jobs through tourism' was the most frequently mentioned topic by responding countries followed by the opportunities to 'improve the livelihoods of local communities'.

Topics related to 'fighting depopulation' and to the 'development of local economy' followed as the second and third-most common mentions. In addition to these, other topics included opportunities to 'improve and develop agriculture and other value chains through tourism', 'improving access to finance and investments', 'poverty reduction' and the 'creation of mechanisms to develop circular economy models'.

The second category receiving the most frequently mentioned topics was conservation and promotion of cultural heritage (19% of total mentions). The 'promotion of cultural resources' and their

'management and conservation' were the most frequent topics listed in this category. The opportunity for 'raising awareness' on the value of culture and its preservation through tourism was also frequently mentioned. Other areas frequently highlighted included the 'value and promotion of local gastronomy' and 'community-based tourism'.

The third most important category contained topics related to environmental opportunities (16% of mentions), namely: 'promotion of natural resources' and their 'management and conservation' through tourism, the call for 'action for climate change' and the implementation of 'green energy'.

Other categories of opportunities were infrastructure and support services (14% of mentions), with the most common topic in this category being the opportunity to 'develop or improve infrastructure and connectivity', tourism products (11%), especially related to increasing 'tourism product development and diversification' and local community empowerment (4%), with frequent mentions to opportunities for 'women and youth empowerment'.

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Figure 3.13. Key topics mentioned by countries when asked about the main opportunities that tourism can bring to rural development
(number of mentions, %)



Notes: 76 member states out of 79 answered this question.

The topics were grouped by category. The numbers inside each category show the ranking of mentions per topic.

Source: Survey of UNWTO members states on tourism and rural development (2023)

Feature box 3.2

Exploring further: how are countries taking advantage of the economic, social, cultural and environmental opportunities brought by tourism?

Economic and social opportunities

Rural tourism can contribute positively to rural development, especially by creating new entrepreneurial businesses. The role of tourism entrepreneurship and digitalization in rural areas has gained increased importance because it has led to the discovery of new business opportunities and the creation of new tourism products. The development of tourism activities contributes to the existence of various service sectors such as rest houses, hotels, tours and activities or handicraft businesses as well as intangible cultural tourism products. As a result of this growth, employment opportunities are becoming available to all members of society. Highlighted examples for economic and social opportunities include the following:

Austria – Holiday on the Farm Initiative

In Austria, The Holiday on the Farm initiative was established to build a common brand – 'Urlaub am Bauernhof', German for 'holidays on a farm', as well as promoting its commercialization through an online portal which in 2022 had more than 2.8 million visitors. The initiative also implemented a classification system based on a set of quality criteria to enhance and monitor the services offered by and linked to the tourism and agriculture ecosystems contributing to sustainable tourism development, education and awareness among tourists. The initiative covers 7,400 holiday farms and 70,000 guest beds in rooms and/or vacation apartments. It generates an estimated annual expenditure of approximately EUR 750 million and a turnover of about EUR 350-400 million. The initiative has resulted in the creation of approximately 23,000 jobs in rural areas. In 2022, rooms were occupied for an average of 125 days across the year and generated an average revenue of EUR 5,078 per bed.

Lebanon – Cezar Projects

In Lebanon, many innovative tourism projects are being created in rural areas by young entrepreneurs and local small and medium-sized enterprises (SMEs) are providing job opportunities and additional income in hard currencies for youth and women. Cezar Projects is a rural development initiative that has worked as a social enterprise since 2017. It is developing standards for rural tourism operations and coordinates rural initiatives in several villages through the Shouf mountain region with the aim of achieving sustainability through retaining local talents, creating innovation in sustainable tourism and generating new sources of income. There are 70,000 people living around the Shouf Biosphere Reserve whose territory is shared by 24 different municipalities belonging to three different districts. Besides the environmental and social sustainability impacts, the Shouf Biosphere Reserve has generated economic benefits through:

1. Carbon: carbon sequestration, biomass production, seed production;
2. Water: Grid water, bottled water, value of wetland, hydropower;
3. Food services: Rangelands, wild harvesting, rural products, increase in honey production;
4. Tourism: Entrance fees, lodging services and guesthouses (B&B), conventional restaurants, events, tourism experiences;
5. Cultural services: The priceless heritage value of the iconic cedar tree.

The local communities succeeded in producing 70 different products designed by members of the local community (mainly women) using traditional methods and traditional recipes that are available for purchase in the visitor centres.

Malaysia Homestay Experience Programme

In Malaysia, the Malaysia Homestay Experience Programme is a tourism product development initiative which has a positive impact on rural areas by increasing income and living standards all the while encouraging the spirit of entrepreneurship and preserving the unique identity and heritage of the communities. The programme aims to encourage rural communities to enter the tourism sector. It has a total of 4,055 registered homestay clusters, with an income performance of

MYR 3,021,130 (approx. EUR 627,367) and a total of 113,729 tourists, both domestic and international, from January to October 2022. This has resulted in job creation in the surrounding communities. In 2019, prior to the pandemic, the homestay programme generated more than USD 6.7 million, benefiting more than 4,200 entrepreneurs/houses from the local community in rural areas.

For more information visit Malaysia Homestay Experience Programme: <https://www.motac.gov.my/en/programme/tourism/homestay>.

Cultural and environmental opportunities

Economic opportunities for rural economies are largely dependent on the available natural resources, primarily agricultural ecosystems which generate strong linkages with other economic sectors, including tourism. Based on the member state responses, rural tourism can play a vital role in the development of rural areas, particularly in relation to nature-based tourism and eco-tourism through the preservation and promotion of those natural and cultural assets. Please refer to the following highlighted examples of cultural and environmental opportunities.

Andorra – Rural Habitat Route

In Andorra, the Rural Habitat Route offers an insight into the customs and way of life of the people of Andorra up until the early 20th century. It comprises three historic house-museums: Casa Areny-Plandolit, a country house of the high society, located in Ordino; Casa Rull, home to a family of farmers located in the village of Sispony (La Massana), which can be visited virtually on Google Maps; and Casa Cristo, an example of a humble country house, located in Encamp.

Georgia – Wine Route

In Georgia, the national tourism administration started the Wine Route project in 2011. The main goal of the project was to support wine tourism development across wine-producing regions of the country by informing tourists about Maranis (wine cellars) and wineries in specific regions and by supporting wine hosts to attract tourists. Initially, around 30 wine hosts became beneficiaries of the project and road signs were installed for them. This served as a catalyst for others to develop their infrastructure and tourism offerings and

to become part of the project itself. Most beneficiaries are small family Maranis located in the rural parts of the country. Consequently, there has been significant growth in this area and, in 2022, over 352 wine hosts became registered Wine Route members. In addition to wine production, the Wine Route offers various wine-related services: wine tasting, participation in harvesting and wine pressing, masterclasses on the preparation of various Georgian dishes, folk shows, etc.

Portugal – Historical Villages of Portugal – Association of Tourism Development (Aldeias Históricas de Portugal – Associação de Desenvolvimento Turístico)

In Portugal, the Historical Villages of Portugal is a cluster of twelve historical villages working towards enhancing tourism development. In its early stages, the initiative focused on infrastructure, the rehabilitation of villages and the development of economic activities linked to tourism. Following on from this, villages have worked towards strengthening areas such as communication, tourism animation and links with public and private agents and communities. The initiatives ‘Cycle 12 in Network – the Villages in Party’ and ‘Recipes that Tell Stories’, are some of the projects developed by the Association to promote gastronomy and local culture.

For more information visit: <https://aldeiashistoricasdeportugal.com/>

Vietnam – Thai Hai village

In Vietnam, Thai Hai village is an example of the opportunities tourism brings for promoting the advantages of agriculture, craft villages, culture and the ecological environment of localities to improve the living standard of local community and for contributing to inclusiveness and sustainable development. Visitors coming to Thai Hai become accustomed with the traditional culture of the Tay people including experiences around daily life, customs, costumes, art, rituals and food among others.

For more information visit <https://vtr.org.vn/thai-hai-reserve-area-of-ecological-houses-on-stilts-village.html>

Chapter 4: Challenges and What is next? – Rural tourism prospects

About this chapter

Tourism in rural areas has been evolving in recent years, particularly after the pandemic as domestic destinations, often located in rural areas, were the first to be visited in many cases, with a larger influx of tourists than ever before. Based on these and other long-term trends, this chapter describes the prospects for tourism in rural areas shared by surveyed countries. Additionally, it offers a brief outline on how rural tourism is linked to the Sustainable Development Goals and the 2030 Agenda. This final chapter also summarizes the main takeaways of the first UNWTO survey on tourism for rural development to member states.

Keywords

Tourism prospects, decade, trends, vision, future, sustainable development goals, next steps

Key message

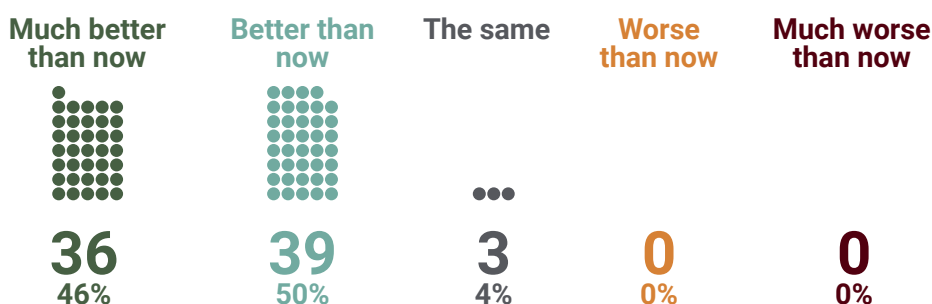
When asked about the next decade scenarios for rural tourism, 47% of countries responded that it will be 'much better than now', paired with 49% of responses expecting it to be 'better than now'. Combined, 96% of responding countries expect a better scenario for rural tourism in the next decade.

4.1 What are the main challenges for rural development through tourism?

There is a vast consensus among responding countries about the prospects of rural tourism in the next ten years. A total of 35 countries (47%) agreed that by the end of this decade rural tourism will be “much better than now”, followed by 37 countries’ (49%) responses expecting it to be “better than now”. Together, 96% of responses set an optimistic scenario for tourism in their rural areas.

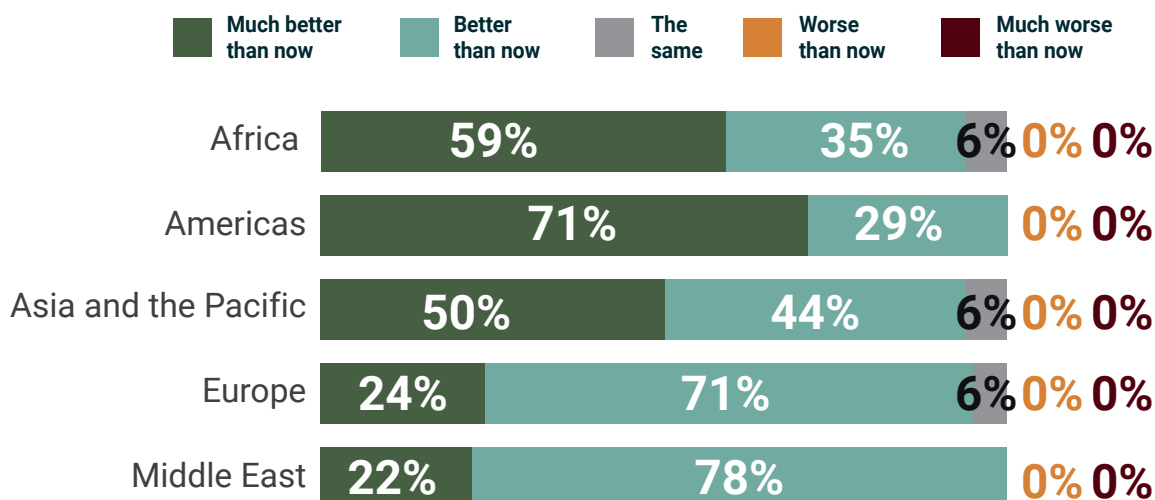
As only positive responses were recorded from all respondents the trend is similar across all regions, with the most optimistic outlook reported by the Americas, Africa, and Asia and the Pacific.

Figure 4.1 Prospects of countries for rural tourism (number of countries, %) “By the end of this decade, what are the prospects for rural tourism in your country?”



Note: 78 member states out of 79 answered this question.
Source: Survey of UNWTO members states on tourism and rural development (2023).

Figure 4.2 Prospects for rural tourism by region (%) “By the end of this decade, what are the prospects for rural tourism in your country?”



Note: 78 member states out of 79 answered this question.
Source: Survey of UNWTO members states on tourism and rural development (2023).

4.2 How is rural tourism linked to the Sustainable Development Goals (SDG) Agenda¹

Member states were also asked about which SDGs are considered when planning for or implementing rural tourism initiatives in their own countries.

- Five SDGs emerged as the most popular among at least half of the responding countries:
- SDG 8 on decent work and economic growth is the most significant SDG for rural tourism with 63 mentions (82%);
- SDG 1, no poverty, is the second most frequently mentioned SDG (49 countries, 64%);
- SDG 11, sustainable cities and communities (42 countries, 55%);
- SDG 5, gender equality (41 countries, 53%);
- SDG 12, responsible production and consumption (39 countries, 51%).

Feature box 4.1

How are countries supporting SDGs in the planning and implementation of rural tourism?

The Malaysia Homestay Experience Programme (see box 3.1 in chapter 3) implements SDG 8 on how to ensure decent work and economic growth by fostering more environmentally sustainable communities in terms of cleanliness and efficiency. A key element in this is to ensure that new jobs are created with no additional strain placed on the land and resources available.

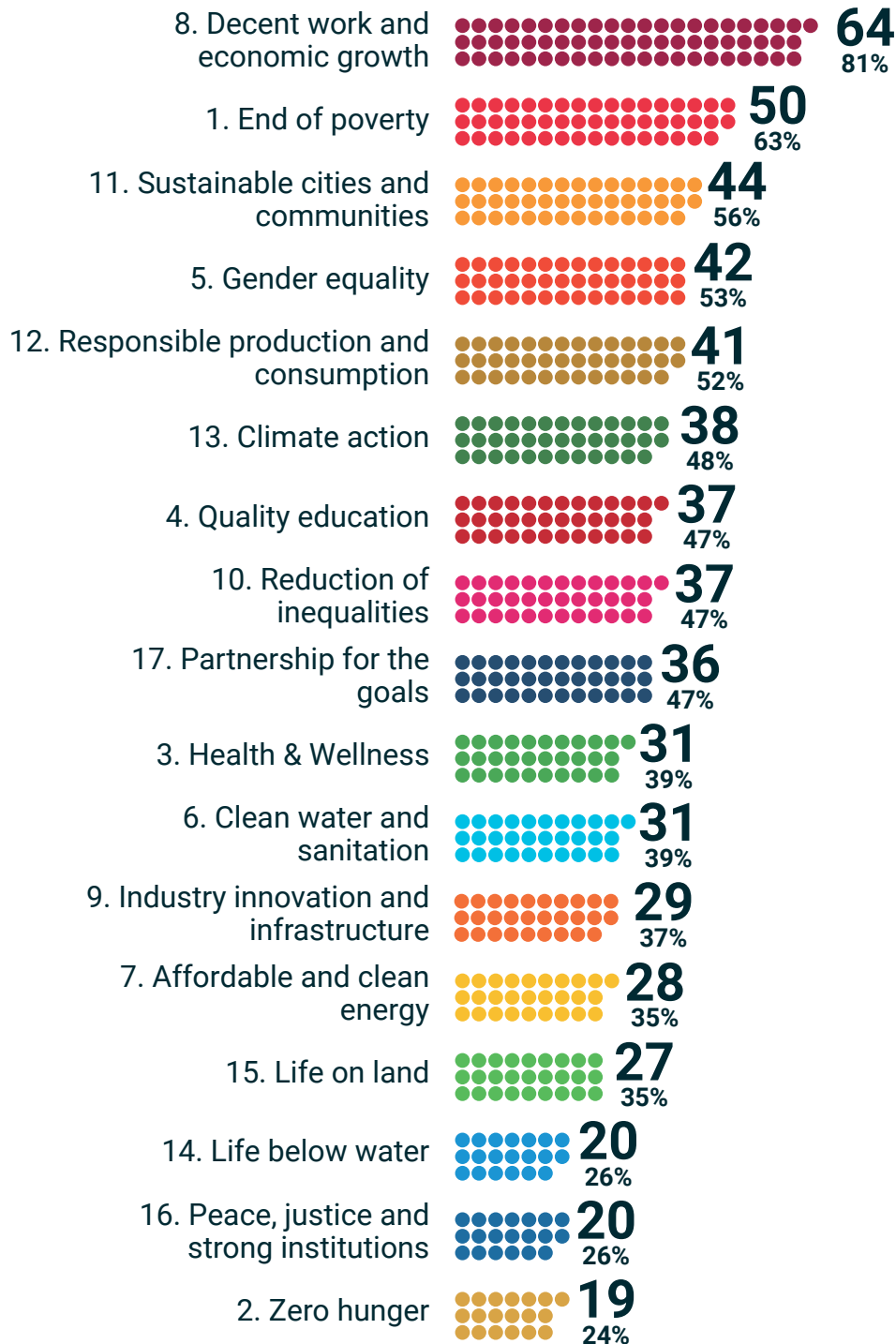
In Haiti, at the rural community level, both men and women actively participate in the development of rural tourism infrastructure (SDG 5) and in turn, the economic benefits are proportionally distributed. Moreover, the coffee route and the cocoa route initiatives contribute to the fight against climate change.

In Egypt, the Egyptian initiative, “Egyptian Woman”, launched by one of the Egyptian women entrepreneurs and led by professional trainers is dedicated to training women in the handicrafts field of leatherwork and sewing. The overall objective is to provide job opportunities, support women’s independence and motivate them to improve the standard of living for their families and local communities. The initiative supports UN SDG 8 “decent work and economic growth” by empowering women and assisting them in finding marketing opportunities for their products.

The initiative’s main objective is to develop women’s skills towards producing handicrafts, create a skilled female workforce in the handicraft industry and to establish tailored projects to improve their economic and living standards.

¹ United Nations (2015), ‘Transforming our World: The 2030 Agenda for Sustainable Development’, A/RES/70/1, UN, New York, online available at: <https://sdgs.un.org/publications>.

Figure 4.3. Countries considering SDGs when planning for or implementing rural tourism initiatives (number of countries, %)



Note: 79 member states out of 79 answered this question

Source: Survey of UNWTO member states on tourism and rural development (2023)



Conclusions

Rural tourism is a priority for the UNWTO member states that participated in the first UNWTO survey on tourism and rural development. Rural tourism is recognized as a driver of rural development and the preservation and promotion of heritage in rural landscapes.

Countries responding to the survey have identified the high potential of tourism to stimulate economic growth and social change in rural areas. The creation of jobs and other economic opportunities, the improvement of local livelihoods and the conservation and promotion of cultural and natural resources are recognized, among others, as the most important opportunities that tourism can bring for the development of rural areas.

These opportunities are frequently reported by the responding countries which is supported by the fact that tourism and rural development is a high priority across national plans and agendas and is further supported by the presence of mechanisms to foster tourism development in rural areas.

It is also important to recognize the key challenges and limitations that can hinder the tourism industry in achieving its full potential with respect to rural development. Infrastructure gaps remains the top key challenge to overcome, followed by the challenges of human and economic dimensions, human resources and training and governance and financial mechanisms. Urgent actions are required to overcome these obstacles to maximize the positive impacts of tourism in rural landscapes.

The results presented in this report have shown that tourism can be a crucial component in the development of rural areas across regions. It creates significant economic, social and environmental benefits, which are recognized and supported by all countries and are expected to increase in the near future, therefore creating a challenging yet engaging scenario for rural tourism worldwide.

The survey results will enable UNWTO and its member states, plus other decision-makers, destination

managers and tourism stakeholders to gain a deeper understanding of the current status of tourism in rural areas across the globe, thereby facilitating the creation of the necessary policies directed towards harnessing the advancement of rural development through tourism.

Important remarks to be noted across the following areas:

- Infrastructure, particularly transport and digital infrastructure, is key for the competitiveness and sustainability of rural destinations. The promotion of policies to help tackle the current infrastructure challenges is needed as an enabling factor for rural development through tourism;
- An inclusive approach to transforming rural areas requires close attention to the diversity of culture, traditions, landscape, etc. The promotion and conservation of this diversity is key to developing a rural tourism development agenda;
- Policies should recognize and promote the role that tourism can play as a driver for economic development and its contributions to the improvement of local livelihoods. Furthermore, policies should always be framed under the valorization and promotion of rural, cultural and natural heritage, entailing sustainable and resilient approaches.
- Equality for women, youth and minority groups at policy and strategic level should be addressed by developing and implementing regional and national interventions which promote economic empowerment.
- Efforts across all areas should focus on providing an enabling normative and regulatory framework, adequate investment, guidance and incentives to develop and manage tourism in rural areas in a more effective and sustainable manner.
- There are a number of concrete good practice examples in several countries across regions with successful policy initiatives that can be adapted for replication throughout other rural destinations across the globe.

Annex: Survey questionnaire

Some contents and descriptions of the following questionnaire have been simplified to be published in this report.

Section A – What is rural tourism?

In this section we would like to know if you have any comments on the UNWTO's rural tourism definition.

1. UNWTO has defined rural tourism as follows:

“Rural tourism is a type of tourist activity in which the visitor’s experience is related to a wide spectrum of products generally linked to nature activities, agriculture, ways of life and rural cultures, fishing with canes and visiting places of interest. Rural tourism activities take place in non-urban (rural) settings with the following characteristics: 1. low population density, 2. landscapes and land use planning where agriculture and forestry prevail, and 3. social structures and traditional ways of life.”

2. Do you agree with this definition?

- a. Yes
- b. Yes, but with comments
- c. No

3. What comments do you have about this definition?

Section B – Rural Tourism in Policy

In this section we would like to know if rural tourism has its own definition in your country and if it is prioritized within your country's tourism planning.

4. Do you have a specific definition of rural tourism in your country?

- a. Yes
- b. No

5. What is the definition?

6. Is rural tourism part of the priorities established in tourism planning in your country?

- a. Yes
- b. Not specifically, but indirectly
- c. No

7. Could you describe how it has/has not been prioritized?

Section C – Data on Rural Tourism

In this section we will ask you about which data on rural tourism is available in your country. If you can provide these statistics, we will ask you to share them for the most recent years available.

8. Specifically for rural tourism, select the data you have available in your country. Please select all that apply. If you have another data type not shown in the list, you can use the “other” field to specify.

- a. Total visitors
- b. Day visitors
- c. Tourists (overnight visitors)
- d. Overnights
- e. Occupancy rate
- f. Spending
- g. Income
- h. Other

We are currently consolidating the rural tourism data available within our Member States. Upon completion of this survey, we would like to contact you to request access to the data you have marked/ listed as available in your country.

Following this survey, can we contact you/one of your colleagues in relation to sharing your statistics on rural tourism with us?

- a. No, we would prefer not to share the statistics at this moment.
- b. Yes, you can contact us in relation to sharing the data. Please insert the name and email of the contact person below:

9. Does your country have any official open data portal relating to tourism, or any other online resource where tourism statistics are published?

- a. Yes
- b. No

10. Please indicate the URL addresses of the portals.

11. What are the challenges you face when collecting rural tourism data? Select all that apply:

- a. Lack of training, education and skills among small rural tourism providers to collect data.
- b. Limited knowledge in the latest technologies used in the field.
- c. Availability of technologies for gathering, processing or analyzing data.
- d. Limited knowledge and capacity of local authorities/destination management organizations.
- e. Limited budget.
- f. Rural tourism statistics are not a priority.
- g. Community engagement and cultural/lingual barriers.
- h. Other, please specify:

12. Do you need assistance in collecting and analyzing data for rural tourism?

- a. Yes, technical assistance
- b. Yes, financial support
- c. Yes, both
- d. No

Section D – Policy and Planning

In this section we will ask you about various types of actions and interventions on rural tourism in your country, including planning and strategy, public policies, investments, and support systems (financial services, mentoring, incubators, education, and training) that are related to rural tourism.

13. Does your country have a specific rural tourism policy or plan?

- a. Yes
- b. Not specifically, but it is linked to rural tourism
- c. No

14. Please can you briefly describe the policy or plan for rural tourism in your country? If you have any useful links, please provide them in the description.

15. Does your country have quality standards for tourism products in rural areas?

- a. Yes
- b. Not specifically, but it is linked to rural tourism
- c. No

16. Please can you briefly describe any quality standards which exist for products in rural areas in your country? If you have any useful links, please provide them in the description.

17. Does your country have manuals of good practices for tourism products in rural areas?

- a. Yes
- b. Not specifically, but it is linked to rural tourism
- c. No

18. Please can you briefly describe any manuals on good practices for tourism products in rural areas which exist in your country? If you have any useful links, please provide them in the description.

19. Does your country have public investment programs in rural tourism?

- a. Yes
- b. Not specifically, but it is linked to rural tourism
- c. No

20. Please can you briefly describe any public investment programs on rural tourism in your country? If you have any useful links, please provide them in the description.

21. Does your country have tax incentives or fiscal policies for rural tourism?

- a. Yes
- b. Not specifically, but it is linked to rural tourism
- c. No

22. Please can you briefly describe any tax incentives or fiscal policies in place for rural tourism in your country? If you have any useful links, please provide them in the description.

23. Does your country have incentives for employment or entrepreneurship in rural tourism?

- a. Yes
- b. Not specifically, but it is linked to rural tourism
- c. No

24. Please can you briefly describe any incentives for employment or entrepreneurship in rural tourism in your country? If you have any useful links, please provide them in the description.

25. Does your country have any of the following support systems that are related to rural tourism?

- a. Mentoring
- b. Incubators
- c. Financial assistance services
- d. Education programs (related to formal education in academic institutions)
- e. Training or capacity building programs
- f. Other

26. Please can you briefly describe the support systems related to rural tourism that you have marked as available in your country? If you have any useful links, please provide them in the description.

Section E – Challenges for rural areas development and tourism

In this section we will ask you to rank the priority of different challenges or limitations that affect the development of rural areas through tourism in your country. You can also mention other challenges or limitations that we have not included in the list that you think are important for your country.

27. Rank the items from highest to lowest priority for your country, 1 being the highest priority:

Topic 1: Infrastructure and Services

1. Deficiencies in roads, ports, airports, and other infrastructure that allow access to rural areas.
2. Deficiencies in public transport services for people or goods.
3. Shortages of basic services (drinking water, sewage, sanitation systems, electricity)
4. Gaps in telecommunications, internet coverage, and digital services.
5. Lack of health care services in rural areas.
6. Lack of security plans/systems in rural areas (i.e., natural disasters, emergency plans, etc.)
7. Lack of other services (i.e., schools, hospitals, ATMs)
8. Other, please describe:

Topic 2: Population and economy

1. Depopulation in rural areas (population migrating to urban areas).
2. Inequality in economic income across rural areas.
3. Gaps in decent and fair employment conditions.
4. Limited participation of minorities or vulnerable groups as well as women and youth.
5. Other, please describe:

Topic 3: Digitalization and information technologies

1. Limitations in the handling of data, information, and knowledge management.
2. Limitation in the use of digital platforms for payments.
3. Limitation in the use of digital technologies for bookings.
4. Limitation in the use of digital platforms/means for communications (social media).
5. Other, please describe:

Topic 4: Governance and financing mechanisms

1. Lack of public-private-community partnerships.
2. Lack of multi-level governance.
3. Lack of engagement amongst residents and communities in the consultative process.
4. Limitations in accessing or management of financing systems.
5. Lack of appropriate planning and sustainable development instruments.
6. Lack of appropriate and consistent monitoring systems.
7. Lack of a tourism dedicated management structure/person
8. Other, please describe:

Topic 5: Natural and cultural resources

1. Risks, impacts, and/or degradation of natural resources.
2. Risks, impacts, and/or degradation of cultural resources.
3. Deficiencies regarding the efficient use of energy resources, water or other natural resources.
4. Limitations in residents' awareness about the preservation of natural or cultural heritage.
5. Conflicts in the use of resources, land tenure, and accessibility to housing.
6. Waste management.
7. Other, please describe:

Topic 6: Destinations, tourism products, and business environment

1. Limitations in the development of innovative tourism products in rural areas.
2. Limitations for the creation or consolidation of smart destinations in rural areas.
3. Limitations in the integration of the entire tourism value chain.
4. Lack of or degradation of authentic experiences in rural areas.
5. Deficiencies in the marketing, promotion, or commercialization of tourism products in rural areas.
6. Limitations in dealing with the seasonality of tourism.
7. Limitations in supporting new ventures.
8. Other, please describe:

Topic 7: Human resources and training

1. Lack of skills development in addition to attracting and retaining workforce talent.
2. Lack of adequate training and education programs.
3. Other, please describe:

28. Please rank the following topics, which account for the grouping of challenges and limitations, as per the previous question, according to your countries' priorities.

Rank the items from highest to lowest priority for your country, 1 being the highest priority:

1. Infrastructure and services
2. Population and economy
3. Digitalization and information technologies
4. Governance and financial mechanisms
5. Natural and cultural resources
6. Destinations, tourism products, and business environment
7. Human resources and training

29. We want to identify the main opportunities for the development of rural areas through tourism. Can you provide examples of the opportunities that tourism brings which can positively impact the rural areas in your country?

Section F – Successful cases in rural tourism in your country

We want to know about successful cases or good practices of rural tourism in your country. Please focus your responses on interventions that comprise more than one village (i.e., clusters of villages, routes, policies, investment, financial mechanisms, etc.).

In case of having successful cases of individual villages, we invite you to visit the "Best Tourism Villages by UNWTO" and apply to the next edition.

If you would like to share successful cases on public policy or regional interventions related to rural tourism, you can describe up to three cases in the following questions.

30. Case 1:

Name of the case study:

Target stakeholders of the initiative:

Objectives and description of the initiative:

Results (if available):

31. Case 2:

Name of the case study:

Target stakeholders of the initiative:

Objectives and description of the initiative:

Results (if available):

32. Case 3:

Name of the case study:

Target stakeholders of the initiative:

Objectives and description of the initiative:

Results (if available):

Section G – Prospects for the development of rural tourism

This section focuses on your assessment of how rural tourism will perform in the future.

33. What are the prospects for rural tourism in your country?

By the end of this decade, and considering your current and prospective plans do you expect that the situation of rural tourism in your country will be:

- a. Much better than now
- b. Better than now
- c. The same
- d. Worse than now
- e. Much worse than now

Section H – Rural Tourism and SDGs

We want to know how the Sustainable Development Goals (SDGs) are linked to rural tourism planning and development in your country.

34. Below we list the 17 SDGs. Please mark the objectives that are considered when planning for or implementing rural tourism initiatives in your country. For those you select, please provide a brief description, example or case study that shares how SDG in question is linked to rural tourism. You can select more than one SGD. [Multiple choice]

1. End of poverty
2. Zero hunger
3. Health & Wellness
4. Quality education
5. Gender equality
6. Clean water and sanitation
7. Affordable and clean energy
8. Decent work and economic growth
9. Industry innovation and infrastructure
10. Reduction of inequalities
11. Sustainable cities and communities
12. Responsible production and consumption
13. Climate action
14. Submarine life
15. Life of terrestrial ecosystems
16. Peace, justice and strong institutions
17. Alliance to achieve the objectives

Please describe. If you have any useful links, please provide them in the description.

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Tourism has high potential to stimulate economic growth and social change in rural areas because it contributes to local economies, support other products value chains, distributes benefits across both seasonal and geographic grounds, and promotes the conservation of cultural and natural heritage.

Through the UNWTO Tourism for Rural Development Programme, the Organization seeks to enhance these and other opportunities that tourism can bring to rural areas. To devise adequate actions and develop impactful initiatives, it is essential to have solid knowledge and data to help support and monitor the evolution of this important agenda.

The **World Tourism Organization (UNWTO)**, United Nations specialized agency, is the leading international organization with the decisive and central role in promoting the development of responsible, sustainable and universally accessible tourism. It serves as a global forum for tourism policy issues and a practical source of tourism know-how. Its membership includes 159 countries, 6 territories, 2 permanent observers and over 500 Affiliate Members.



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