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# **Agritourism for Rural Development in Italy, Evolution, Situation and Perspectives**

**Fabio Maria Santucci<sup>1\*</sup>**

<sup>1</sup>*Department of Economics and Food Sciences, Faculty of Agriculture, University of Perugia, Italy.*

### **Author's contribution**

*The only author performed the whole research work. Author FMS wrote the first draft of the paper. Author FMS read and approved the final manuscript.*

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## **ABSTRACT**

This paper deals with agritourism in Italy and it is based on several recent studies, unpublished papers and statistics. Italy has a long and diversified experience in the agritourism sector, which since 1985 has been formally recognized with a national legislation, accompanied by regional laws. Agritourism has represented one of the main drivers for on farm diversification and has contributed to the economic development and wellbeing of rural areas, by attracting millions of tourists into parts of the country which were ignored even by Italians. The offer is very diverse, ranging from small and simple family farms to luxurious estates, with services of the highest quality. In 2010, with 19,973 operators and about 200,000 beds available, there were more than two million guests, out of which 50% foreigners, who spent on the farm an average of 4.5 nights. Agritourism operators have net farm incomes and returns to family labour higher than the normal farmers, but some worries are there, because the utilization rate of the rooms – the major indicator for the tourism industry, in 2011 and 2012 was the lowest when compared to other categories of operators. Suggestions are consequently advanced, such as more professionalism, better market segmentation, diversified and integrated offers through travel operators, regional marketing, and national categorization of the agritourism farms, based on quality parameters.

**Keywords:** *Multifunctionality; rural employment; marketing; regional marketing; rural development.*

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\*Corresponding author: Email: [fmsant@unipg.it](mailto:fmsant@unipg.it);

## **1. INTRODUCTION**

Italy is the only country within the European Union with specific laws regulating agritourism, which is considered an agricultural activity. This paper has been written to share the Italian experiences and to illustrate what has been made and still needs to be improved, for the benefit of the farmers and of the whole society, in Italy and in other countries.

The Italian tourism industry employs, directly and indirectly, about 2.5 million people and provides about 4 per cent of the Gross Domestic Product [1]. When all linked activities are computed, its relevance rises to 9.4 percent of GDP; in 2010, foreign tourists have brought to Italy about 29 billion euros. These figures position the whole Italian tourism industry at the fifth place, after France, USA, China and Spain, but there are wide margins for improvement [1]. Within the tourism industry, in the last 30 years the phenomenon of agritourism has represented the revival of ancient traditions, coupled with integrated rural development. Within the more general definition of multifunctionality [2,3], agritourism represents one of the major sources of income for farmers. It has also allowed to diversify the tourist offer and to attract visitors out of the most famous mainly urban destinations. Wine and food tourism is enormously important [4] (Osservatorio Nazionale sul Turismo, Rapporto sul turismo 2011, unpublished document, Rome) and has represented in both 2010 and 2011 about 5% of total tourist flow, with a higher relevance for Foreigners (6.9% in 2011) than for Italians (4.2%), but only 11.7% overnight in a farm.

The history [5] of on farm hospitality goes back through the centuries, when travellers and pilgrims had to ask for food and shelter along the routes, whenever a monastery, a guesthouse or a trading post were not available. More recently, in XIX century, the German cultural and philosophical movement called "Romanticism" invited its followers to leave the towns and discover again the nature; walking through fields and woods, as well as climbing on mountains and sunbathing near the seaside became fashionable for the cultural elites. This demand for nature motivated rich entrepreneurs to build luxurious hotels in the Swiss, Austrian and Italian Alps or along the coast in the French Riviera, many of which are still in operation, but it also favoured some clever farmers and landlords, who begun to diversify their activities, by opening guesthouses and small restaurants to accommodate both less demanding guests and very rich clients, searching for a touch of "rural life"

It is however only in the last 30 years, with the very recent explosion of mass tourism, that agritourism (not to be confused with tourism in rural areas) has become a mass phenomenon, involving thousands of farms and moving millions of tourists. Foreign and Italian tourists may now enjoy a day of cultural visits to the abundant cultural heritage and the next day can move to a nearby rural area for a food and wine tasting, or can spend a full week on a farm, relaxing near the swimming pool or engaging into some outdoor sporting activity. Agritourism has exploded everywhere in the world [6] and it represents a viable source of employment and income for smallholders and estate owners in many countries, in all continents.

## **2. METHODOLOGY**

This paper is based on a literature survey and own experiences by the Author. The desk work has been performed during the months July – December 2012, by consulting published articles [1,2,3,13,15,17,18,19,20,21] and books [4,5,6,7,9,10,11,12,14,16] as well as unpublished documents (fully referred to in the text, as the guidelines for this Journal

impose), produced by associations, institutions, and interest groups. Taking into account that the international literature about agritourism is nowadays enormous, only the most relevant papers are mentioned in this paper. Data about tourism and agro-tourism in Italy have mainly been found in the ISTAT website ([www.istat.it](http://www.istat.it)) the Italian national bureau for statistics, while some unofficial data have been provided by Agriturist, a farmers' association, and made public by INEA [8], the National Institute for Agricultural Economics ([www.inea.it](http://www.inea.it)).

### **3. RESULTS AND DISCUSSION**

Italy has always been a major tourist destination [5]: centuries ago, it was the pilgrims who came from the whole Christianity to worship in Rome and to pay homage to famous Saints scattered all over the country. Then it was the desire to see the ruins and the legacy of the Roman Empire and the masterpieces of the Renaissance, which motivated nobles and artists to visit Italy for the so called "grand tour".

After the II World War and during the economic boom that characterized the 50's and 60's, the natural beauties of the Mediterranean coast and of the Alps were discovered by millions of foreigners, mainly European. Italians too, thanks to their increased income, started to enjoy their holidays and begun discovering the beauties of their own country. In recent years, although the rivalry with traditional competitors (France, Spain, and Greece, just to mention a few) remains strong and competition with newcomers (Turkey, Egypt, Morocco, Emirates, etc.) is fierce, the flow of tourists has remained quite strong. One of the challenges of the tourism industry has been to attract tourists out of the usual routes, main towns and destinations (Naples, Rome, Florence, Pisa, Rimini, Venice, the Alps, etc...), to discover the nature, the cultural heritage and the foods of the whole country.

An increasing number of tourists, not only in Italy [7], is searching new experiences and expresses the desire to reconnect with the cultural roots of foods, in the places where the ingredients are originated and where gastronomy was born. Within this framework, agritourism has played and will play a major role, because the farms are perceived by the urban consumers as the best places for leisure, and at the same time the farmers need to diversify their sources of income.

The number of farms offering some sorts of hospitality (Table 1) has increased from 8,905 in 1998, when this type of data were first collected, to 19,973 in 2010, equal to an average annual growth of +7.96%, thanks to the investments by the farmers themselves, partially supported by capital grants provided by various Funds of the European Union. The number of beds has annually increased even more, by 9.86%, from 68,754 in 1998 to 193,480 in 2009 (data for 2010 and 2011 not available). The average availability in 2009 is consequently 10.1 beds per operator, versus the initial number of 7.7 beds per farm in 1998. A similar expansion can be observed for the estimated turn-over, defined as the gross value of goods and services sold to clients.

**Table 1. Evolution of agritourism in Italy**

Year	Farms no.	Beds no.	Turn over*
1998	8,905	68,754	
1999	8,758	100,000	400
2000	9,314	110,000	500
2001	10,662	111,000	620
2002	11,487	118,000	710
2003	12,603	129,000	780
2004	14,719	152,700	797
2005	15,327		
2006	16,765	167,087	880
2007	17,720		1.000
2008	18,480	189,013	1.100
2009	19,019	193,480	1.000
2010	19,973		1.025
2011			1.230

\*In 10<sup>6</sup> current euro; missing data not made available by the source.

Source: [8]

The 19,019 agritourism farms registered in 2009 were unequally scattered all over Italy (Table 2), with peak concentrations in a few regions like Tuscany and Trentino - South Tirol, where respectively 21.3% and 16.8% of the Italian agritourism farms were located. In the same Table it is possible to notice that in these two Regions the relevance of agritourism is extremely high: in Trentino - South Tirol, on the Alps at the North-eastern border with Austria, 11% of the active farms are engaged in agritourism activities, and in Tuscany 10% of the active farms are involved in this sector, against an Italian average of 2.4%

It is clear that also in this case, like for all other kinds of innovations, there are early adopters as well as laggards [9] and that in many parts of the Italian Peninsula and of the Islands still there are potentialities to be explored. In Sicily and Puglia, for example, only 0.6% and 0.3% of farmers are involved in agritourism, while both regions offer incredible landscapes, beaches, cultural heritage sites and an extremely rich gastronomy. Low cost flight operators have discovered these destinations and masses of tourists are pouring into these two regions, from Northern European countries, but farmers still have to mobilize themselves to intercept at least a small part of this flow.

### 3.1 Institutional Involvement and Development

When the first modern agritourism activities started in the early '60s, several problems appeared, because of the lack of formal regulations and the consequent struggles with the local branches of the Ministry of Interiors, responsible for the recording the movement of tourists, the Ministry of Finances, responsible for the tax system, and with the Health Ministry, responsible for the health of customers. Even the Chambers of Agriculture and the Municipalities, responsible for issuing the authorizations to operate, did not know how to act. In several occasions, the first pioneers have been fined and even obliged to close their activities, or they were given the option the set up a totally different firm, regulated, registered and taxed as a normal restaurant and hotel. For most small operators, with a few rooms and a seasonal business, this was unrealistic.

**Table 2. Operating farms and agritourism farms in 2009**

Regions from north to south	All farms		Agritourism farms		Index*
	no.	no.	%	% of all	
Piemonte	59,884	963	5.1	1.6	68.2
Valle d'Aosta	1,761	53	0.3	3.0	127.7
Lombardia	49,911	1,246	6.6	2.5	105.9
Liguria	11,563	441	2.3	3.8	161.8
Trentino-South Tirol	28,987	3,192	16.8	11.0	467.1
Veneto	73,831	1,261	6.6	1.7	72.5
Friuli-VG	16,715	524	2.8	3.1	133.0
Emilia-Romagna	64,881	896	4.7	1.4	58.6
Toscana	40,401	4,046	21.3	10.0	424.8
Umbria	17,624	1,020	5.4	5.8	245.5
Marche	31,049	771	4.1	2.5	105.3
Lazio	45,100	704	3.7	1.6	66.2
Abruzzo	29,874	663	3.5	2.2	94.1
Molise	10,828	89	0.5	0.8	34.9
Campania	68,510	849	4.5	1.2	52.6
Puglia	84,434	282	1.5	0.3	14.2
Basilicata	18,830	224	1.2	1.2	50.5
Calabria	30,556	482	2.5	1.6	66.9
Sicilia	87,868	538	2.8	0.6	26.0
Sardegna	34,202	775	4.1	2.3	96.1
Italia	806,809	19,019	100.0	2.4	100.0

\*Index number, calculated with Italy = 100 as base.

Source: Chambers of Agriculture for All Farms; [8] for agritourism farms.

Already in 1965 a first association had been established: *AGRITURIST* ([www.agriturist.it](http://www.agriturist.it)), by a small number of members of the large farmers' union, mainly based in Tuscany, to lobby at local and national level. A few years later, in 1973, the largest family farmers' union, Coldiretti, established its own movement, named *Terranostra* ([www.terranostira.it](http://www.terranostira.it)) (Our land). In 1978, a first training course was organized, by *AGRITURIST* in cooperation with the national Ministry of Agriculture, to inform a group of local officers and potential operators. *Turismo Verde* ([www.turismoverde.it](http://www.turismoverde.it)) (Green Tourism) was set up in 1980 by another union of small farmers. To coordinate their actions, these three organizations have joined in the national association ANAGRITUR.

The continuous pressure by the agricultural sector finally has led the National Parliament to issue the Law 730/1985, updated in 1996 by the Law no. 06, recognizing that agritourism, within certain limits (number of rooms, number of beds, number of seats at the restaurant, source of ingredients for the meals, etc.) is an agricultural activity, regulated for the value added taxation and for income taxation purposes by the same rules that supervise all other agricultural activities. Each one of the 19 Regions and two autonomous provinces composing Italy has then issued its own regional or provincial legislation, sometimes with some minor adaptations to the specificities of local agriculture, culture and traditions.

It is worth mentioning that several local administrations have been very active for the promotion of agritourism. Agricultural products, special foods, cheeses, wines and olive oil, have been used to attract tourists out of the main tourist attractions and into smaller towns and the countryside. In 1990, the Association "Towns of the Truffle" was established,

followed in 1993 by the Movement “Tourism of the Wine” and in 1994 by the Association “Towns of the Olive Oil”. In 1999, the National Parliament issued the national Law no. 268 “Routes of the Wine”, with the norms and guidelines to set up and manage, at local level, an entire system, where the agritourism farms play a major role to attract national and international tourists.

Local authorities, in cooperation with the private sector, have done much for the promotion of their territories, through an active participation in national and international tourism fairs, where large operators interact to elaborate package tours. Another action is the coordination of events, linking local products, culture, art exhibition, music and sports, to have something – always new and attractive, to motivate tourists to come. Another important public action, often implemented also with European funds, has been the rehabilitation and maintenance of common goods, such as pathways, lakesides, natural ponds and rivers, which can be used by the agro-tourists for walks and excursions.

Since 1985, within the first Integrated Mediterranean Programs, and then with the reform of the structural policy in 1988 (Objective 1 and Objective 5b and the Community Initiative LEADER), and nowadays within the Rural Development Plans several actions for the expansion and improvement of agritourism have been co-financed by the European Union to local authorities, to groups and even to individual farmers: feasibility studies, training courses and extension activities, rural museums, territorial promotion, etc. have facilitated the synergies between public and private actors (Pesce A. Lo stato dell'agriturismo in Italia: situazione attuale e prospettive nella politica di sviluppo rurale. unpublished ppt, Osservatorio Nazionale sull'Agriturismo – INEA. Roma. 2010).

### 3.2 Heterogeneity of Agritourism

Within the broad concept of agritourism, there are at least two main categories: the landlords and the family farmers. Although the reality shows itself as a continuum, some typologies might be listed:

- Absentee landlords, living in town, even at great distance, with a mansion in the farm and several independent houses (once occupied by sharecroppers or seasonal workers) that have been restructured into independent apartments, each one with kitchenette; swimming pool and other facilities complete the offer. The relationships with the guests are minimal and managed by an administrator;
- Landlords with large mansions, even a castle, with luxurious rooms, very elegant dining room and several elegantly furnished common spaces (reading room, *fumoir*, billard room, piano, etc.); facilities include swimming pools, gym, spa, various sports, horse riding, game reserve. High quality staff manages the whole business, with occasional presence of the owner.
- Production cooperative, established decades ago for productive purposes, whose members have understood that through diversification they can achieve better incomes. Available buildings have been restructured into rooms and apartments, dining rooms and restaurant. The coop members are involved in the various tasks, from management to reception, cooking, serving in the restaurant, accompanying the guests, etc.

- Farmers with medium – large farm, with buildings transformed into several rooms and apartments (with or without autonomous kitchenette), some common spaces, small swimming pool, some facilities (bikes, archery), occasionally with a restaurant also open to outside guests. Most work is provided by family members, who try to have a relationship with the guests;
- Small farmers, with a small mansion, where only two – three rooms and apartments have been created, simply furnished, with a small dining room, where sometimes guest and family eat together. Outdoor facilities are minimal;
- Didactic or teaching farms are designed for urban children, to teach them subjects related to nature, agriculture, food and nutrition, and are normally managed by cooperatives or medium size farmers;
- Organic agritourism farms, normally managed by cooperatives or by medium and small farmers, are characterized by the organic production methods [10] respected by the farmers on their fields and sometimes by their respect for organic management of the entire structure (water recycling, solar and wind energy, composting of food wastes and leftovers, etc.).

To the first two categories belong all those operators who once managed their large estates with share croppers and farm hands, and also used large amounts of seasonal landless workers. During the green revolution, from the '50s through the '70s, these large producers have simplified their cropping systems and mechanized all operations. Many of these landlords lived and still live in town, have other sources of income, and the farm is managed by a supervisor. These estates had a large number of houses for the sharecroppers and their families, and buildings for the farmhands. In this category, we often find luxurious agritourism operations, offering independent apartments, hotel – like treatments, facilities such horse club, spa, archery, etc. The human relationships between the landlords or the farm supervisor and the clients are almost zero. Tourists are mostly received and interact with employees, who generally have received some training or even an higher education for the hotel industry.

To the 3<sup>rd</sup>, 4<sup>th</sup> and 5<sup>th</sup> category belong the “evolved” family farmers, who have always managed their relatively small farms with the workforce provided by the family members, occasionally helped by some neighbours and more rarely by farmhands. Also the operators of this category have mechanized their operations and simplified their production systems, but they live on the farm and their family income is largely dependent on agriculture. Compared to the '50s, the size of the family has decreased and there are vacant homes and other buildings suitable for agritourism. Within this category, we find simpler on farm accommodations (rooms and apartments), restaurants if the case, and other facilities. Concerning human relationships, in these farms the guests may link directly with the farmers and their families, but the quality of the services might not be as good as in the previous category. In several parts of Italy, back in the '60s and '70s, these types of farmers have established production cooperatives, some of which have recently diversified into agritourism.

Another specialisation within the agritourism, dealing mostly with kids, from 5-6 to 14 years, is represented by the so – called [11] *Didactic or Teaching farms*, where urban kids, accompanied by teachers and sometimes by some parents, can learn about several aspects of the countryside and more generally about natural cycles. There are presently about 2,225

farms of this type, with their own association ([www.fattoriedidattiche.it](http://www.fattoriedidattiche.it)). The establishment and the operations of a didactic farm require special attention and very qualified people. The whole farm must be carefully organized, to avoid even the smallest risk for kids, and all facilities must be sized to let kids work and learn. Some didactic farms have a bakery or a dairy lab where kids can make bread and cheeses under the guidance of an instructor. All didactic farms have a sort of a small zoo, where most farm animals can be seen and touched. The home garden is designed to facilitate the work of kids, who have properly dimensioned tools and implements. The didactic farms offer a variety of options, from the half a day visit to one week stay, full board, from Monday to Friday. There are even didactic farms offering summer weeks with full immersion in English, with mother tongue animators who take care of the young guests.

Another peculiar type of agritourism is represented by the 1,299 *organic agritourism farms*, [12] where the customers are ensured that the surrounding environment is chemical free and that the food is 100% organic. In some cases, also the renovation of the farm buildings has been realized by respecting the guidelines of organic architecture, and the furniture and all textiles have been produced organically. Other aspects are also considered, regarding energy production and energy saving devices, water use and its recycling, composting of food wastes, etc. ICEA, an important Italian certification body for organic products, certifies and classifies the organic agritourism farms into five categories (from one to five “suns”), based on a set of five groups of criteria (protection of environment, ecological management, promotion of local culture, organic food and sustainable transportation; some criteria are compulsory, whereas other ones are optional); presently, this voluntary certification has been asked only by 105 operators.

### **3.3 Farmers' Motivations**

On farm tourism represents an opportunity for farmers and landlords to make full use of their assets and to diversify their activities, with a positive impact on employment and incomes. To practice agritourism, existing buildings need to be renovated and to respect the most recent norms about safety for all visitors and access for people with disabilities. In Italy, where tens of thousands of farm buildings, houses, mansions and even castles in the countryside had been abandoned during the “rural exodus” of the ‘50s and ‘60s, agritourism has represented a great opportunity for many landlords and family farmers alike, who have recuperated and modernized empty buildings often with astonishing results of great quality. The impact of such renovations on the rural economy has been impressive, because small local firms and craftsmen have been involved,.

In some cases, the decision to venture into agritourism is accompanied by an at least partial modification of the crops and of the whole farming system, to produce goods for the tourists and, when the case, for the on farm-restaurant. Fruit trees of all sorts and several types of small animals, eliminated from the farms during the “industrialization” of agriculture have been reintroduced. Horses are quite frequent, normally of breeds known for their peaceful and calm attitudes, and in recent years even mules and donkeys have been reintroduced, for riding and for transporting heavy loads, if excursions lasting several days are among the possibilities offered to the guests. Very frequently, small facilities, always controlled and authorized by the Health Service, are realized for on farm processing of jams, sauces, meats, dairy products, breads, cakes and pies, etc. There has been an enormous effort to revitalize ancient and typical products and recipes [13], to be used at the on farm restaurants and for items to sell to customers



The family members can be engaged in activities which are generally less heavy, less dangerous, better paid and more rewarding (INEA, Indagine sulle tipologie di offerta e sulle motivazioni delle imprese, unpublished document, Rome. 2010) than the traditional agricultural tasks: receiving the guests, cooking the meals, guiding the tourists through the farm and nearby wild areas, explaining how to rear animals, teaching how to make marmalades and pies, etc. Some of these tasks might seem simple and traditional, but they require good communication skills and proper attitudes, while other tasks surely demand appropriate training and even specific education. For example, many potential and actual clients are not Italians and do not speak Italian. Nowadays, most advertising and booking take place through internet and potential customers expect that agritourism operators can write and talk at least in English. Such tasks and the consequent good income normally give more space to the younger members of the family, who might otherwise be tempted to leave and move to town. When young people are not available within the family, there are job opportunities for outsiders, who can be employed with annual or seasonal contracts.

The final result of all these efforts is that the average net farm income per adult working unit is much higher for the agritourism farms than for the farms without agritourism. When the agritourism farms are managed with organic methods, the economic result is even better (Pesce A. Lo stato dell'agriturismo in Italia: situazione attuale e prospettive nella politica di sviluppo rurale. unpublished ppt, Osservatorio Nazionale sull'Agriturismo – INEA. Roma. 2010).

### 3.4 Diversification of the Offer

The diversification of the offer is very important. Most tourists come to the countryside to relax (Table 3), but they do not want to lay idle. After motivations like relax and natural beauty of the surroundings, guests are attracted by the agritourism experience to practice sports, or to taste food and wines, and to visit the surroundings and the cultural heritage.

**Table 3. Motivations of agritourists (%) in 2009**

<b>Motivations</b>	<b>Italians</b>	<b>Foreigners</b>
Ideal place for relax	46.7	44.0
Natural beauty of the place	44.8	49.9
Ideal place for sports	30.7	15.0
Exclusive location	18.1	6.6
Good prices	16.6	17.6
Desire to visit a place never visited before	15.0	13.3
Food and wines	8.3	14.1
Available amusements	7.7	7.9
Ideal place for kids	7.4	16.1
Cultural heritage nearby	6.3	15.2

Source: [14]

To meet the expectations of the incoming guests (Table 4), tasting activities are organized by 66.5% of the operators, walks by 53.3%, followed by cultural activities by 43.7%, bike rides by 40.9%, cooking classes by 33.5% sporting events area available by 20.8% and so on. Many operators rent bikes, horses, canoes, organize excursions to natural attractions and to nearby monuments. In many villages and small towns there are museums, churches, and ancient manors open to the public worth a visit. In some cases, weekend long courses or one week courses are proposed, generally in cooperation with local artists or craftsmen to

learn how to paint, to make ceramics, or to carve objects in wood. In other cases, very exotic programs are offered, such as yoga courses, alternative medicine, or classes of various philosophies.

**Table 4. Services offered at agritourism farms in 2010**

<b>Services</b>	<b>%</b>	<b>Activities</b>	<b>%</b>
Rooms / apartments	89.1	Tasting	66.5
Farm shop	79.2	Walks	53.3
Restaurant	68.5	Cultural activities	43.7
Swimming pool	37.1	Bike rides	40.9
Camping	10.7	Cooking classes	33.5
Tennis	4.8	Didactic farms	33.2
Indoor gym	2.3	Cultural meetings	28.4
Other services	5.6	Excursions	24.4
		Sporting activities	20.8
		Horse rides	14.0
		Handicraft courses	8.4
		Other activities	10.9

*Source: INEA, Indagine sulle tipologie di offerta e sulle motivazioni delle imprese, unpublished document, Rome. 2010*

When these activities are not possible within one single farm, the presence of this flow of tourists ignite other off farm activities, proposed by local firms, such as fishing and canoeing, paragliding, ballooning, tree climbing, etc., all activities linked with nature and normally managed and staffed by young rural people.

To accommodate the tourists, not only the buildings, but also the surrounding areas must be improved and nice looking. The road leading to the farmhouse, from the farm gate to the parking lot must be kept in good status, decorative shrubs and trees must be planted, and flowers must embellish the entire area. Taking into consideration the long and hot Italian summers, the presence of a swimming pool is nowadays almost a must and as a matter of fact the pool is present in 37% of the agritourism farms. In some cases, there are also other facilities, like a small gym and a sauna. All these aspects do not only make the tourists happy, but they also contribute to the improvement of the life quality of all farm family members [15], who also obviously enjoy the pool, the gym and the whole improved setting. Agritourism operators normally show a higher level of self and job-satisfaction, when compared with the normal farmers, because they feel more appreciated and better understood by the society at large. It is not only a matter of higher income (which is normally the rule), but a sum of different factors: the higher quality of their houses and surroundings, the appreciation of the clients, the fact that many visitors express their positive judgement in the international websites, etc.

### 3.5 Growth with Some Clouds

The expansion of the number of agritourism farms has been accompanied by a constant increase of the arrivals of guests, from Italy and abroad (Table 5). The number of Italians coming to agritourism farms to spend at least some of their holidays has grown from 847,000 in 2005 to 1,298,000 in 2010 (+ 53%), without any sign of downturn. The number of days spent at the farms has shown a lesser growth (+ 39%) and these two combined phenomena determine that the average stay of an Italian tourist has decreased from 3.95 nights to 3.59

(Table 6). The same can be said about the foreign visitors, whose total number of arrivals from 2005 to 2010 has grown even more, by 61%, but whose average stay has decreased from 6.38 to 5.96 nights.

**Table 5. Arrivals and nights of stay in agritourism farms**

Years	Italians				Foreigners				Total			
	Arrivals		Days of stay		Arrivals		Days of stay		Arrivals		Days of stay	
	n000	Δ%	n000	Δ%	n000	Δ%	n000	Δ%	n000	Δ%	n000	Δ%
2005	847		3,346		504		3,212		1,350		6,558	
2006	929	9.7	3,619	8.2	579	14.9	3,595	11.9	1,508	11.7	7,214	10.0
2007	1,092	17.6	4,132	14.2	680	17.5	4,115	14.5	1,772	17.6	8,246	14.3
2008	1,169	7.1	4,350	5.3	709	4.3	4,436	7.8	1,878	6.0	8,786	6.5
2009	1,213	3.7	4,433	1.9	741	4.5	4,530	2.1	1,954	4.0	8,962	2.0
2010	1,298	7.0	4,654	5.0	812	9.7	4,843	6.9	2,110	8.0	9,498	6.0

Source: Elaboration on ISTAT data

**Table 6. Average stay (no. of nights)**

Year	Italians	Foreigners	Total
2005	3.95	6.38	4.86
2006	3.90	6.21	4.79
2007	3.78	6.05	4.65
2008	3.72	6.26	4.68
2009	3.65	6.11	4.59
2010	3.59	5.96	4.50

Source: ISTAT

Much of this modification can be due to changing patterns of tourism, with people preferring shorter and more frequent holidays, distributed throughout the year, with the so called "vagabond tourism", with people moving, during the same holiday, from region to region, and consequently changing hotel or agritourism every two-three days.

The nationality of the foreign guests is another important aspect (ISMEA. La domanda di agriturismo in alcuni mercati europei, unpublished document, Rome. 2012), since it influences their behaviour and must be considered in any promotional activity. Most foreigners come from nearby German speaking countries, like Germany, Austria and Switzerland and they normally reach their destination with their own car. A similar behaviour can be observed for the Dutch, who have enormously increased their presence in the agritourism farms and more recently for citizens of Eastern European countries, like Croatia, Slovenia, Poland, Czech Republic, etc.

Most European tourists [16] plan carefully their holidays and spend long time browsing the net: they visit the websites of the likely destinations, ask for more information from the agritourism operators, and compare prices. Tourists from other countries, like Spain, United Kingdom, the Nordic Countries and Russia normally arrive by air and tend to prefer the traditional destinations: towns like Rome, Venice, Naples, sea resorts like Capri or the Riviera and the Alps. Something similar can be said for the Japanese, Korean and Chinese tourists [17], who furthermore rarely travel alone and normally came with well organized package tours, which leave no time to the countryside and agritourism; most US citizens

come to Italy in groups and just a small minority comes to visit the countryside, but their number is growing.

### 3.6 Problems and Perspectives

A major problem for agritourism farmers is the growth of non farm rural tourism. The rising demand for holidays in the countryside is luring non agricultural investors and operators, to offer several other types of hospitality: hotels, pensions, *maison de charme*, *relais et chateaux*, bed and breakfast, hotels with a nearby farm, rural houses, camping sites, etc. Another type of competition, in the upper part of the market, is represented by the wellness centres established in the countryside, sometimes built from scratch, sometimes built on pre-existing farm buildings, where rich people come for a one or two week body and mind treatment, with massages, spa, personalised menu (generally bio, macrobiotic and vegetarian), relaxing walks in the countryside, etc. All these activities are surely positive for the rural economy, but many customers, both Italians and foreigners, confuse these experiences with agritourism, and consequently they represent a direct competition with the original on farm tourism.

The relative gravity of the situation is demonstrated by the decreased utilization rate of the available rooms (Table 7), that for all agritourism farms was in 2012 only 31.7%, twelve points below the average of all hotels.

**Table 7. Utilization rate of rooms (%)**

<b>Category of accomodation</b>	<b>2011</b>	<b>2012</b>
Hotels (all classes)	48.4	44.0
Other types of accomodations	37.6	36.6
-- Agritourism	32.8	31.7
Italy	43.8	40.6

*Source: Osservatorio Nazionale sul Turismo. Rome. 2013*

The best performance was shown by the five star hotels, with a utilization rate that was near to 60%. This difference is surely due to several factors, that make the 5 star hotels unique and unreachable, such as the locations and the quality of services, but another aspect to consider is the amount of resources spent for advertisement, promotion and coordination with large scale tourism operators. Most agritourism farmers are aware of this weakness [14]: 80.9% think that their promotion needs a profound change and only 7.5% believe that they are already doing the best they can do.

In the actual competitive and globalized world, the individual promotion, implemented by each agritourism, must be mainly made through internet, with an updated and interactive website, in several languages, with videos and photo gallery and possibly at least one video cam offering 360° view of the farm in all moments of the year. Old style leaflets and brochures may still be used, to be distributed at national and international fairs of the sector, like Agri&Tour held in Italy annually, and the BIT (International Exchange of Tourism) held also in Italy in Milan, mainly for international operators, but to attract large numbers of clients, the links with some foreign and domestic tour operators could be a more appropriate – although partial solution, proposing some sorts of packages. In this case the problem is that tour operators purchase in advance a large number of nights, beds and services, but squeeze the prices and the margins become extremely thin. Another option, not yet fully explored is a more attractive and diversified prices policy for the different moments of the

year (peak season, mid-season, national holidays, low season, etc.) and for the different categories (singles, elderly, families with children, groups of at least n persons, etc.). There are periods of the year when families with kids at school cannot travel, but older people have more freedom. In some periods, the climate might not be attractive for Italians, but it could be more than satisfactory for Northern Europeans, who fear the heat of the summer instead.

More and always diversified activities are needed [17], on the farm or nearby, also in cooperation with other agritourism farms, artists and local craftsmen. The local and national consumers can be attracted when a range of possibilities are offered, ranging from pottery to textiles, from food processing to paintings, all sorts of yoga courses and so on.

Time has also arrived to recognize formally that agritourism farms do not all belong to the same category. Like hotels and pensions, there should be national standards, based on multiple criteria, to assess the quality of the structures, of the personnel and of the services. Like for the hotel industry, agritourism farms should be given a final score, from one to five, with one meaning very low quality and five meaning top class; the Ministry of Agriculture has already elaborated a proposal (*Proposta per una metodologia unitaria di classificazione dell'agriturismo italiano*. unpublished document. Rome. 2010) that must be shared and improved by the Regional Governments, to which in Italy agricultural policy has been devoluted. About ten Regions, out of the twenty composing Italy, have already introduced a classification system, with farms having from one to five "wheat ears", but the parameters and the scoring methods are not homogeneous.

#### **4. CONCLUSION**

For almost three decades, since the early '80s, agritourism has represented a very good opportunity for increasing on farm employment and income. Within the new paradigm of multifunctionality, agritourism has facilitated both horizontal and vertical diversification. Millions of tourists have been at least partially diverted from the classic destinations and attracted into rural areas. Places never visited before by any tourist have been discovered by Italians and foreigners, lured by the beauty of landscapes, the quality of foods, the relaxing atmosphere and the friendly hospitality. Agritourism has played a pivotal role for rural development, with a multiplying effect on induced activities [18,19].

This initial take-off phase, characterized by a good dose of naïveté, with many operators entering into the sector with much enthusiasm but without proper planning or proper training, is nowadays over. This is not typically Italian, because similar problems can be found also in other countries [20] The low and decreasing utilization rate of the last two years, also in comparison with other segments of the tourist sector, confirms that the Italian agritourism movement needs a higher level of professionalism and a better organization. The sustainability, i.e. long term economic survival of the whole sector, without continuous public financial support for private (investments) and common goods (promotion), needs to be revisited and better understood [21].

Concepts like market segmentation should become familiar and should be applied: the same type of offer cannot be proposed to young Italian couples and to older Germans. Each category of potential clients (children, the elderly, families, organic and vegetarians, rich Russians and alternative Americans, animal lovers, adventurers and relax lovers, and so on) should be the object of study and of appropriate offers, organized in a package, to be marketed online or through travel agencies.

The individual promotion, which remains of extreme importance, should progressively be accompanied and complemented by integrated offers, developed together by different operators to realize the much needed scale and goal economies. A territorial marketing approach, that links together agritourism, culture, outdoor activities, indoor activities, food and wine tasting, and more, should be sought, to propose diversified and rich experiences, where the guests can enjoy a sort of full immersion into that specific part of Italy. Another type of package could be organized around the rich gastronomy of Italy, offering guided tours through different regions, to discover the variety of Italian foods and wines, exactly in the places where they were born; also this latter proposal clearly requires a collaborative approach by many operators, coordination and professionalism.

Several typologies of public – private partnerships could be implemented, to develop synergies and to cooperate for the enhancement of both public and private goods, for strengthening and expanding this sector, that represent an important source of jobs and income, mainly for women and younger generations. In this specific economic moment, such peculiar aspects of agritourism are more important than and deserve a special attention.

## **COMPETING INTERESTS**

The author has declared that no competing interests exist.

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