

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

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ABSTRACT

This review paper deals with agritourism in Italy and it is based on several recent studies, unpublished papers and statistics.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, and categorization of the agrotourism farms, based on quality parameters

Keywords: Multifunctionality; Rural Employment; Marketing; Regional Marketing; Rural Development.

1. INTRODUCTION

The Italian tourism industry employs, directly and indirectly, about 2.5 million people and provides about 4 per cent of the Gross Domestic Product. 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 Italy 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. It has also allowed to diversify the tourist offer and to attract visitors out of the most famous destinations. Wine and food tourism is enormously important (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.

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The history 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, and 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 authenticity"

It is however only in the last 30 years, with the very recent explosion of mass tourism, that agritourism 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 [4] and it represents a viable source of incomes for smallholders and estate owners in many countries, in all continents.

2. METHODOLOGY

This paper is based on both a literature survey and own researches and experiences by the Author. The desk work has been performed during the months July – December 2012, by consulting published articles and books as well as unpublished documents, produced by associations, institutions, and interest groups. Data about tourism and agro-tourism in Italy have mainly been found in the ISTAT website (www.istat.it) the Italian national bureau for statistics.

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, 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 [6]. 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 +7.7%, thanks to the investments by the farmers themselves, partially supported by capital grants provided by the European Union within several phases of its Rural Development Programmes. The number of beds has increased even more, by 10.1%, from 68,754 in 1998 to 193,480 in 2009 (data for 2010 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.

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-Sud 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 - Sud Tirol, at the North-eastern border with Italy, on the Alps, 11% of the active farms are engaged in agritourism activities, and in Tuscany 10% of active farms are involved in this sector, against an Italian average of 2.4%

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 10⁶ current euro

Source: [7]

It is clear that also in this case, like for all other kinds of innovations, there are early adopters as well as laggards [8] 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.

Table 2. Operating farms and agritourism farms in 2009

Regions	All farms	Agritourism farms			
	no.	no.	%	% of all	index
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-Sud 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

3.1 Heterogeneity of agritourism

Within the broad concept of agritourism, there are at least two main categories: the landlords and the family farmers.

To the first category 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 a training or even higher education for the hotel industry.

To the second 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 income is largely dependent on agriculture. Compared to the ‘50s, the size of the family has decreased and there were vacant homes and buildings suitable for agritourism. Within this category, we find simpler on farm accommodations (rooms and apartments), restaurants if the case, and other facilities. Clearly, 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;

A very special segment within the agritourism, dealing mostly with kids, from 5-6 to 14 years, is represented by the so – called *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. 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 kind 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 English speaking animators taking care of the young guests.

Another peculiar type of agritourism is represented by the 1,299 *organic agritourism farms*, 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 following 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.

3.2 Motivations and goals

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 houses, mansions and even castles in the countryside had

190 been abandoned during the “rural exodus” of the ‘50s and ‘60s, agritourism has represented
191 a great opportunity for many landlords, who have recuperated and modernized empty
192 buildings, which were almost falling apart. The impact of such renovations on the rural
193 economy has been impressive, because small local firms and craftsmen have been
194 involved. Such renovations have taken place also in the case of smaller family farms, where
195 the family size has dropped, and there were unused buildings or empty wings of the main
196 building. In other cases, empty farm buildings, once used for animal productions or for
197 storage, have been recycled into rooms, apartments and dining rooms, often with
198 astonishing results of great quality.

199
200 In some cases, the decision to venture into agritourism is accompanied by an at least partial
201 modification of the crops and of the farming system, to produce goods for the tourists and,
202 when the case, for the on farm-restaurant. Fruit trees of all sorts and several types of small
203 animals, eliminated from the farms during the “industrialization” of agriculture that took
204 place in the ‘60s and ‘70s, have been reintroduced. Horses are quite frequent, normally of
205 breeds known for their peaceful and calm attitudes, and in recent years some agritourism
206 farmers have even reintroduced mules and donkeys, for riding and for transporting heavy
207 loads, if excursions lasting several days are among the possibilities offered to the guests.
208 Very frequently, small facilities, always controlled and authorized by the Health Service, are
209 realized for on farm processing of jams, sauces, meats, dairy products, breads, cakes and
210 pies, etc. There has been an enormous effort to revitalize ancient and typical products and
211 recipes, to be used at the on farm restaurants and for items to sell to customers.

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

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228 The final result of all these efforts is that the average net farm income per adult working unit
229 is much higher for the agritourism farms than for the farms without agritourism. When the
230 agritourism farms are managed with organic methods, the economic result is even better
231 (Pesce A. Lo stato dell’agriturismo in Italia: situazione attuale e prospettive nella politica di
232 sviluppo rurale. unpublished ppt, Osservatorio Nazionale sull’Agriturismo – INEA. Roma.
233 2010).

234 235 **3.3 Diversification of the offer**

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

242 To meet the expectations of the incoming guests (Table 4), tasting activities are organized
 243 by 66.5% of the operators, walks by 53.3%, followed by cultural activities by 43.7%, bike
 244 rides by 40.9%, cooking classes by 33.5% sporting events area available by 20.8% and so
 245 on. Many operators rent bikes, horses, canoes, organize excursions to natural attractions
 246 and to nearby monuments. In many villages and small towns there are museums, churches,
 247 and ancient manors open to the public worth a visit. In some cases, weekend long courses
 248 or one week courses are proposed, generally in cooperation with local artists or craftsmen
 249 to learn how to paint, to make ceramics, or to carve objects in wood. In other cases, very
 250 exotic programs are offered, such as yoga courses, alternative medicine, or classes of
 251 various philosophies.

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

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 258 To accommodate the tourists, not only the buildings, but also the surrounding areas must be
 259 improved and nice looking. The road leading to the farmhouse, from the farm gate to the
 260 parking lot must be kept in good status, decorative shrubs and trees must be planted, and
 261 flowers must embellish the entire area. Taking into consideration the long and hot Italian
 262 summers, the presence of a swimming pool is nowadays almost a must and as a matter of
 263 fact the pool is present in 37% of the agritourism farms. In some cases, there are also other
 264 facilities, like a small gym and a sauna. All these aspects do not only make the tourists
 265 happy, but they also contribute to the improvement of the life quality of all farm family
 266 members, who also obviously enjoy the pool, the gym and the whole beautiful scenario [11].

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Table 3. Motivations of agritourists (%)

Motivations	Italians	Foreigners
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

271 Source: [9]

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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.

3.4 Institutional involvement and development

In modern times, the first agritourism activities can be traced back to the early '70s, but several problems quickly aroused, 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.

Already in 1965 a first association had been established: *AGRITURIST*, 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* (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* (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.

Table 4. Services offered in 2010

Services	%	Activities	%
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: [10]

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 fairs of tourism, 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 1980, within the first Integrated Mediterranean Projects, and then with the LEADER rural development projects, 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.

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 4.86 to 4.5 nights.

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.

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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

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The nationality of the foreign guests is another important aspect [11] (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.

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

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Most European tourists 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 [12]. 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, 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

The success of agritourism and the growing 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 growing number of 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, composed of 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. 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 (INEA 2010b): 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.

Table 7. Utilization rate of rooms (%)

Category of accomodation	2011	2012
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

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.

To attract large numbers of clients, if the agritourism farm has at least twenty beds, 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, 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.

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 [13] [14] [15].

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 [16]. 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 better organization. The sustainability of the whole sector needs to be revisited and better understood [17].

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, hopefully organized as 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 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.

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. ICEA, a certification body for organic products, also 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. Such examples show that some agritourism operators and institutions are aware that consumers want to be ensured about the quality of the hospitality, but such experiences should be up-scaled and the standards should be applied at national level.

COMPETING INTERESTS

The Author has declared that no competing interests exist.

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APPENDIX