ACCESSING DEMAND CHARACTERISTICS OF AGRITOURISM IN ITALY

UDC 338.48(450)
Review

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Received 15 July 2011
Revised 1 August 2011
20 March 2012

Abstract
The purpose – The aim of this paper is to investigate the demand characteristics of agritourism in Italy, which has not been fully investigated despite the relatively high number of the supply-side studies on the Italian agritourism.
Design – First this paper conceptually characterized the features of agritourism as the old and modern types and outlined the trend of supply and demand in agritourism in Italy in comparison with Japan. Second, this paper statistically examined the characteristics in the demand side for agritourism in Italy in comparison with tourism demand in general, such as that for hotels.
Methodology and approach – Data were obtained from 'Annuario Statistico Italiano' edited and issued by ISTAT (Istituto Nazionale di Statistica). Data from 1997 were compared with those from 2006. We examined the regional characteristics and trends in the composition of domestic and inbound tourists in relation to agritourism.
Findings – (1) Agritourism experienced rapid growth in the number of beds available and of those tourists who stayed overnight during the last decade while the operation rate of agritourism is much lower than that of tourism in general. (2) The market for agritourism domestic demand accounted for more than half of the total agritourism demand. The remaining demand was filled by inbound tourists from European countries. These inbound tourists are driving the growth of agritourism in this country. Even if we consider the particular reasons for low barriers to travel in Europe, these findings clearly indicate that it is essential for the development of agritourism to count not only on domestic but also inbound tourists to raise the operation rate.
Originality of the research – The originality comes from the investigation of agritourism in Italy by focusing on the demand factors in comparison with tourism in general.
Keywords Agritourism in Italy, Tourism demand, Domestic and inbound tourism

INTRODUCTION

Agritourism in Italy has experienced remarkable development since the inauguration of the national legal framework for agitourism in 1985. Although studies on agritourism have been hitherto conducted by mainly focusing on the supply side (Ohe and Ciani, 1998, 2003, 2005, 2011; Velázquez, 2005), comprehensive studies on the demand side have been scant, probably due to data constraints. Tourism studies from the aspect of demand in Italy indicate that local cuisine, including wine, is among the attractions most favored by tourists in Italy (Baloglu and McCleary, 1999; Baloglu and Mangaloglu, 2001; Getz and Brown, 2005). Guizzardi and Mazzocchi (2009) disclosed that the tourism demand in Italy is stipulated by business cycle. In contrast, as a negative factor in Italy, the effects of earthquakes on tourism were evaluated by Mazzocchi and Montini (2001). Peypoch (2007) disclosed the relative high productivity of the tourism industry in general in Italy.

The data on the demand side for agritourism has recently become available through official government statistics and has enabled us to investigate the demand side as well as the supply side. To this end, first we characterize agritourism in comparison with the old type of tourism activity in rural areas and also outline agritourism in Italy in comparison with Japan as a sharp contrast in terms of stages of development.

Second, this paper focuses on recent characteristics in demand for agritourism in Italy by taking into account supply side trends and examines demand characteristics, local distinctiveness, and features of inbound tourists in comparison with those of tourism in general. Then we attempt to clarify the issues for the future and implications related to agritourism in other counties. Agritourism in Italy is defined as tourism activity that is conducted by farm producers or a group of farm producers, which is called farm tourism or agro-tourism in other countries. In contrast, other tourism activity in rural areas conducted by non-farm people is defined as rural tourism in this country. Thus, we use ‘agritourism’ and ‘farm tourism’ interchangeably here.

CHARACTERIZING AGRITOURISM

Traditionally, tourism activity has been executed by farm producers as a side job in the winter time in snowy areas, e.g. in Europe and Japan. Nevertheless, this is different from what we call agritourism now. This is because there are two types of tourism activity by producers: the old type and the modern type. Table 1 compares the main characteristics of the two. The modern type corresponds to ‘agritourism’.

The old type of tourism activity was conducted by producers in Western Europe and Japan for years before modern agritourism began. A typical example is farmhouse accommodation, which was offered as an auxiliary business during the slack farming period in winter. This old type of activity is quite often performed around ski resort areas. The main aim of visitors is not to stay at a farm, but to engage in non-farm related activities such as skiing in winter or hiking in summer. Hence, the demand for a farm stay is a derivative or a secondary one. For this reason, visitors do not expect a high level of service quality and tend to be satisfied with cheap service. Likewise, producers do not have an incentive to improve quality through the integration of farm and tourism activities and therefore can run the accommodation business with low skills. In that market, consumers can enjoy the service as a cheap leisure activity of low quality that does not require high income, which can be termed as a ‘down-market’. Many traditional farmhouse accommodations remain at this stage in Japan but are losing visitors due to the inability to cope with the modern needs of visitors. If operators want to survive, they must transform their operation to a modern type. In Italy, for instance, this transition was relatively smoothly conducted while in Japan this transition has been very slow (Ohe, 2008).

On the contrary, at the modern stage, producers newly reconfigure traditional tourism services and provide new services that meet current needs of society. Producers offer not only accommodation services, but also full-fledged service goods, taking advantage of tangible and intangible rural goods such as rural amenities and heritage experiences that include local food and farm products. The demand for these modern services, therefore, is not secondary, but becomes original in the sense that people primarily come to visit the countryside and to stay at the farm. To properly comply with this modern demand, producers need to have higher management skills that enable them to grasp what tourists want through the integration of farm and tourism activities than the skills required by the old type of farm tourism (for the integration of farm and tourism activities, see Ohe, 2010). Because of the quality-oriented nature of agritourism, the market at this stage is supposed to be an up-market with services of relatively high quality and corresponding prices that reflect such quality.

Table 1: **Comparison of old and modern agritourism**

Features	Old type	Modern type
Supply side	Utilization of idle facility and labour	Utilization of multifunctionality
	Low quality of service	High quality of service
	Low level of management skills	High level of management skills
Demand side	Derivative	Original
	Low level of needs	High level of needs
Market	Down market	Up market
Example	Accommodation for skiers	Agritourism

Especially, service management, interior design and provision of meals are domains in which women can exercise their potentials and set their own economic agendas. Such women can explore their capabilities, which could not be demonstrated in the conventional farming arena, which is male-dominant and in which women remain in a subsidiary role (for gender issues including rural tourism in Japan, see Tsutsumi, 2000; Nakamichi, 2009). This is why farm women are often proactive in engaging in rural tourism (for gender issue and rural tourism, see Ohe, 2007; Brandth and Haugen, 2010).

Another important issue is that rural tourism can generate jobs for the young and even the elderly on an on-farm basis, which gives a more encouraging perspective on succession in farm family businesses. The conventional way of earning income through off-farm job holding does not guarantee sustainability and development of the farm business even if the living standard of the farm household is raised with income from outside the farmyard. Rather, part-time job-holding in other industries by successors to the farm business has actually worked as a detriment to sustaining the farm business because these farm people often lose their agrarian identity. Agritourism, per contra, enables producers and farm successors to find a new agrarian identity through the extension of the activity domain at the on-farm level. This is a crucial point in increasing on-farm jobs in a sustainable way.

In this context, for the sustainable development of agritourism it is necessary to raise producers' skills in service management.

OVERVIEW OF AGRITOURISM IN ITALY IN COMPARISON WITH JAPAN

Keeping the characterization above in mind, now I show the outline of agritourism development in comparison with Japanese case although the availability of statistics on agritourism activity is very limited because it is such a new activity. It should be noted that the degree of growth in agritourism varies from one country to another in reality.

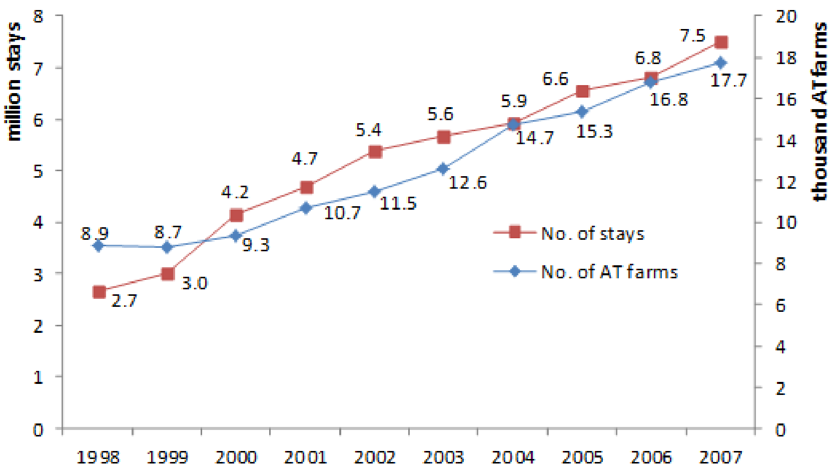
Table 2: **Demand trend of agritourism in Japan**

Year	2004	2005	2006	2007	2008	2009
No. of overnight stay to agritourism public facilities (ten thousand people)	770	777	795	813	844	848

Source: Ministry of Agriculture, Fisheries and Forestry of Japan

First, Table 2 shows the demand trend for agritourism, which is called green tourism, in Japan. The number of overnight stays has been increasing 1.1 times from 7.70 million stays in 2004 to 8.48 million stays in 2009. This demand is generally composed of domestic tourists although there is no statistics on this point. Government statistics also showed that the number of farms engaged in agritourism has increased from 1,492 in 2005 to 2,006 farms in 2009 although only the data on the two years are available. We can say that agritourism in Japan has not grown remarkably, but that it has experienced gradual growth.

Figure 1: **Trends of number of stays and of agritourism farms in Italy**



Source: No. of stays were from 'Annuario Statistico Italiano' by ISTAT and the no. of agritourism farm were from 'Agricoltura Italiana Conta' by INEA

In sharp contrast, agritourism in Italy has shown remarkable growth, as confirmed by the statistics shown in Figure 1. Figure 1 depicts right-upward trends in both demand and supply sides of agritourism. The number of agritourism farms approximately doubled from 8.9 thousand farms in 1998 to 17.7 thousand farms in 2007 and the number of stays in agritourism facilities has increased 2.8 times from 2.7 million to 7.5 million during the same period. The annual growth rate during the same period in the number of stays was 4.8% while that in the number of agritourism farms was 3.8% (from the regression result in the form of $\ln Y_i = \alpha_i + \beta_i Trend$, where ln=natural logarithm, Y_1= the number of stays, Y_2=the number of agritourism farms, *Trend*=1998,…,2007, α_i=constant, β_i=parameter of growth rate, estimated β_1 and β_2 :1% significance).

This newly growing farm business has created an opportunity not only for established farm people, but also for those newcomers who were attracted from urban areas with high jobless rates and who moved into rural life through engaging in farm and agritourism activities (Ohe and Ciani, 1998). This is why agritourism in Italy is often said to be one of the successful cases in agritourism development (Ohe and Ciani, 2011). Thus, Italian agritourism clearly demonstrates that tourism activity by farmers can enhance the unexplored potential of the rural community to activate.

In short, the differences between the two countries in terms of growth rate in agritourism is mainly derived from the difference between the speed of the transition from the old type to the modern type of agritourism as shown in Table 1. Thus, we can confirm the significance of capability building for operators from these two cases. Next what we need to explore is to examine the demand structure of agritourism in Italy.

DATA AND METHODOLOGY

We obtained data from the most comprehensive official statistics, i.e., Annuario Statistico Italiano (ASI), which is annually edited and issued by ISTAT, the National Institute of Statistics. ASI provides data that show socio-economic trends in the Italian society. Data on agritourism have been recorded in the section on tourism (chapter 18) since the 1998 issue that reported on region-wise surveys made in 1996, such as the number of beds in tourist facilities, etc (ISTAT, 1998). The demand data that we used included the number of inbound tourists and overnight stays on a region-wise basis beginning in the 1999 issue that contained data collected in 1997. We used the data surveyed from 1997 to 2006 because both regional demand and supply side data are available for this period. In the case of Japan and China, however, due to the lack of data for 2005 and 2006, we compared data between 1997 and 2004 instead of between 1997 and 2006.

Before exploring demand, we first look at supply side characteristics in agritourism in comparison with those of Italian tourism markets in general and characterize agritourism in Italy. Then, we explore the demand aspects by focusing on the significance of agritourism in the Italian tourism markets, its regional characteristics and its share of inbound tourists. Finally, we suggest policy recommendations for the development of agritourism.

RESULTS

Supply side

We briefly look at the characteristics in the supply side for agritourism. Table 3 shows the region-wise percentage of share of beds in various types of accommodations: the north accounted for more than half of the share of hotel beds, indicating a high regional concentration. Although the total number of beds in hotel accommodations in all of Italy increased 1.2 times in the latest decade, the percentage of beds in hotel accommodations dropped sharply from 50% in 1997 to 31.7% in 2006. This is because of the increase in other types of accommodations in the same period. Table 3 indicates the regional share of non-hotel accommodations such as room or apartment rentals; the north accounted for two thirds of this type of accommodation, showing a higher concentration of this type of accommodation in the north than that of hotels. The number of beds in these non-hotel accommodations increased sharply, 2.6 times, from the previous decade, raising the share of non-hotel beds to nearly 10% (9.2%) of the total number of provided beds.

Table 3: **Change in No. of Beds in Various Types of Accommodation and Regions from 1997 to 2006**

Types of accommodation	Region	1997	2006	06/97	Regional share in 2006 (%)
Hotel	North	1.024.880	1.120.114	1,1	53,7
	Central Italy	350.149	422.325	1,2	20,2
	Tuscany	152.702	184.288	1,2	8,8
	South	397.067	544.503	1,4	26,1
	Whole Italy	1.772.096	2.086.942	1,2	100,0
	% Share of total no.	50,0	31,7	0,6	-
Room/apartment rental	North	111.423	400.312	3,6	66,0
	Central Italy	95.207	150.936	1,6	24,9
	Tuscany	22.980	55.026	2,4	9,1
	South	22.732	55.233	2,4	9,1
	Whole Italy	229.362	606.481	2,6	100,0
	% Share of total no.	6,5	9,2	1,4	-
Agritourism	North	23.571	51.711	2,2	33,3
	Central Italy	23.490	76.194	3,2	49,1
	Tuscany	14.275	45.199	3,9	29,1
	South	7.037	27.202	3,2	17,5
	Whole Italy	54.098	155.107	2,9	100,0
	% Share of total no.	1,5	2,4	1,5	-

Source: Annuario Statistico Italiano, ISTAT

In contrast to the supply side features of hotel and non-hotel accommodations, the share of beds in agritourism facilities was only 2.4% of the total number of tourism facilities in 2006. However, the number of beds in agritourism greatly increased, that is, 2.9 times, from 1997 to 2006. Although the number of beds in hotels in all of Italy slightly expanded, i.e., 1.2 times, there was no large difference in expansion between regions. However, in agritourism, there was a difference between regions. While the rate of increase was the largest in the south along with central Italy, the share was still small. While the number of beds was almost identical between the north and central Italy in 1997, there was a larger increase in central Italy both in the number of beds and share of total beds from agritourism from 1997 to 2006.

To summarize, although agritourism accounted for only a small percentage of the number of beds among accommodation facilities, it is characterized by a higher rate of increase and a greater regional concentration than that of hotels. Thus, it is safe to say that agritourism has been a growing sector in the Italian domestic tourism market in the last decade.

Demand side
Regional demand, types of accommodation and domestic demand

Here we examine demand side aspects. Tourism statistics in Italy, including ASI, include data on the number of arrivals and stays on the demand side. When we compared the data between 1997 and 2006, we noted larger differences among accommodation facilities than in the supply side. Facility-wise, hotels accounted for nearly 70% of the share of total accommodation demand in terms of the number of stays, which means that hotels remain the principal market for accommodation demand in this country (Table 4). Region-wise, the north accounted more than half of the hotel demand. Average duration of stay was 3.3 days in 2006, which represented a 1.3 times increase in hotel demand in the decade. The average duration of stay in terms of the number of days was obtained by the number of stays/ the number of arrivals.

Table 4: **Change in Demand for Type of Accommodation and Region from 1997 to 2006 (Hotel)**

Type of accommodation	Region	Category	1997	2006	06/97 ratio	*Regional share in 2006 (%)
Hotel	North	No. arrivals	32.060.852	40.024.174	1,2	53,9
		Mean duration of stay	3,8	3,4	0,9	
	Central Italy	No. arrivals	16.940.356	22.229.719	1,3	24,8
		Mean duration of stay	2,7	2,8	1,0	
	Tuscany	No. arrivals	6.930.848	8.152.334	1,2	8,9
		Mean duration of stay	2,8	2,8	1,0	
	South	No. arrivals	11.063.543	14.725.818	1,3	21,3
		Mean duration of stay	3,6	3,6	1,0	
	Whole Italy	No. arrivals	60.064.751	76.979.711	1,3	100,0
		Mean duration of stay	3,5	3,3	0,9	
	% share of this type	No. stays	-	68,1	-	-

Source: Annuario Statistico Italiano, ISTAT
Note: * indictes the regional share in terms of no. of stays in 2006

Table 5: **Change in Demand for Type of Accommodation and Region from 1997 to 2006 (Room Rentals)**

Type of accommodation	Region	Category	1997	2006	06/97 ratio	*Regional share in 2006 (%)
Room/apartment rentals	North	No. arrivals	954.217	2.498.158	2,6	65,7
		Mean duration of stay	9,2	8,6	0,9	
	Central Italy	No. arrivals	418.874	1.254.662	3,0	26,9
		Mean duration of stay	12,0	7,0	0,6	
	Tuscany	No. arrivals	250.555	842.581	3,4	15,3
		Mean duration of stay	8,8	5,9	0,7	
	South	No. arrivals	188.280	342.783	1,8	7,4
		Mean duration of stay	8,6	7,1	0,8	
	Whole Italy	No. arrivals	1.561.371	4.095.603	2,6	100
		Mean duration of stay	9,9	8,0	0,8	
	% share of this type	No. stays	-	8,8	-	-

Source: Annuario Statistico Italiano, ISTAT
Note: * indictes the regional share in terms of no. of departures in 2006

Next, although the category of room or apartment rentals accounted for less than 10% of the total accommodation demand, about two thirds of the demand for this type of facility was concentrated in the north (Table 5). On the other hand, although central Italy accounted for 26.9% of the share, the rate of increase tripled in the last decade, and was especially high in Tuscany (3.4 times increase).

Agritourism in central Italy accounted for 51.8% of the total agritourism demand in terms of stays; in particular, Tuscany's share was more than one third, confirming the regional concentration of agritourism in central Italy as observed for the supply side (Table 6). The rate of demand increase in agritourism grew 4.8 times during the last decade, which was greater than the supply side increase and increase in demand for other accommodations. The increase in the south was greatest, at 9 times. Nevertheless, share of the total accommodation demand by agritourism was less than 2% in Table 6, which means that agritourism demand is still at the marginal stage. The mean duration of stays in agritourism accommodations shortened from 6.0 to 4.8 days in the decade. In short, we can say that the demand pattern in agritourism differed from the traditional hotel demand pattern. Does the cause of this rapid demand increase in agritourism represent an increase in inbound tourists or in domestic tourists? This point is vital to clarify the demand structure of agritourism in Italy.

Table 6: **Change in Demand for Type of Accommodation and Region from 1997 to 2006 (Agritourism)**

Type of accommodation	Region	Category	1997	2006	06/97 ratio	*Regional share in 2006 (%)
Agritourism	North	No. arrivals	124.109	540.942	4,4	37,2
		Mean duration of stay	6,5	4,9	0,8	
	Central Italy	No. arrivals	224.948	747.009	3,3	51,8
		Mean duration of stay	5,6	5,0	0,9	
	Tuscany	No. arrivals	140.434	493.654	3,5	36,6
		Mean duration of stay	6,1	5,3	0,9	
	South	No. arrivals	23.861	214.181	9,0	11,0
		Mean duration of stay	7,0	3,7	0,5	
	Whole Italy	No. arrivals	372.918	1.502.132	4,0	100,0
		Mean duration of stay	6,0	4,8	0,8	
	% share of this type	No. stays	-	1,9	-	-

Source: Annuario Statistico Italiano, ISTAT
Note: * indictes the regional share in terms of no. of stays in 2006

To approach this aim, first, we look at the characteristics of domestic tourism. Table 7 shows the share of domestic tourists according to accommodation facilities in terms of number of stays. Domestic demand accounted for more than half of the demand in hotel and non-hotel facilities in 2006 (hotels 56.3%, non-hotels 58.7%). Thus, we can say that Italian accommodation demand consists of two major markets: domestic and inbound markets. In the case of agritourism, the share of domestic tourists increased from 44.9% to 50.1% in the last decade, indicating growth in the domestic market.

Table 7: **% Facility-wise Share of Type of Accommodation among domestic Tourists**

Year	Four-five stars	Three stars	Two stars	Hotel total	–
1997	44,2	61,7	67,0	58,9	–
2006	46,2	61,3	62,0	56,3	–
06/97 ratio	1,04	0,99	0,93	0,96	–
Year	Camping site	Room/apart-ment rental	Agritourism	Non-hotel total	Total
1997	59,9	55,0	44,9	61,0	59,5
2006	57,9	56,6	50,1	58,7	57,0
06/97 ratio	0,97	1,03	1,12	0,96	0,96

Source: Annuario Statistico Italiano, ISTAT

Table 8: **Domestic Tourism Demand in Italy**

Category	Hotel			Non-hotel			
	Four-five stars	Three stars	Hotel total	Camping site	Room/apart-ment rental	Agri-tourism	Non-hotel total
Total no. stays (10,000 people in 2006)	3.929	8.123	14.178	3.645	1.852	3.610	6.935
% share of type of accommodation*	18,6	38,5	67,2	17,3	8,8	1,7	32,8
06/97 ratio	1,8	1,3	1,2	1,1	2,2	3,6	1,3
Mean duration of stay	2,7	3,6	3,3	8,4	9,2	3,9	7,5
06/97 ratio	1,1	1,0	0,9	0,9	0,8	0,8	0,8

Source: Annuario Statistico Italiano, ISTAT
Note: *indicates % share of type of accommodation in terms of no. of stays

From the viewpoint of domestic tourists, two thirds of domestic tourists chose to stay in hotels (67.2%) and the remaining one third in non-hotel facilities (32.8%), which clearly exhibits Italian's national preference for hotels (Table 8). In contrast, although the domestic demand for agritourism grew 3.6 times in the decade, only 1.7% of Italian tourists, a very tiny portion, stayed in this type of accommodation. Italian tourists stayed in hotels an average of 3.3 days and in agritourism facilities an average of 3.9 days, which is less than half of the duration for room or apartment rentals (9.2 days). In any case, the duration of stay is getting shorter in every category of accommodation.

Inbound demand

Here we examined inbound tourists nation-wise. Generally, the number of those tourists who stayed in agritourism facilities from European countries increased, although the duration of stay shortened. Especially, the number of stays remarkably increased more than that of arrivals from UK, Germany, Belgium, Ireland, the Netherlands and the Scandinavian countries. In addition to those from European countries, there was an upward trend in inbound tourists from North America, Oceania and Israel. Given the overall inbound characteristics noted above, we specifically focused on those countries that sent a large number of inbound tourists to Italy.

Table 9: **Inbound Tourism Demand in Italy (Germany and the Netherlands)**

Country	Category	Hotel			Non-hotel			
		Four-five stars	Three stars	Hotel total	Camping site	Room/apart-ment rental	Agri-tourism	Non-hotel total
Germany	Total no. stays (10,000 people in 2006)	746	1.664	3.009	1.111	495	162	1.837
	% share of type of accommodation*	15,4	34,3	62,1	22,9	10,2	3,3	37,9
	06/97 ratio	1,3	1,0	0,9	1,0	1,3	2,1	1,1
	Mean duration of stay	4,2	4,8	4,6	7,3	8	6,8	7,1
	06/97 ratio	1,0	1,0	1,0	1,0	0,9	0,9	1,0
The Netherlands	Total no. stays (10,000 people in 2006)	67	141	244	524	56	27	615
	% share of type of accommodation*	7,7	16,4	28,4	61,0	6,6	3,1	71,6
	06/97 ratio	2,1	1,6	1,6	2,0	2,9	4,7	2,1
	Mean duration of stay	2,9	3,7	3,4	8,9	7,6	6,7	8,4
	06/97 ratio	1,0	0,9	1,0	1,1	0,8	0,9	1,1

Source: Annuario Statistico Italiano, ISTAT
Note: *indicates % share of type of accommodation in terms of no. of stays.

First, we could recognize large differences in the demand patterns from one main country to another. According to Table 9, German tourists, in comparison with those from the Netherlands, accounted for the most inbound tourists to Italy, stayed more often in hotels than non-hotels at a 6:4 ratio, stayed in agritourism facilities at a low rate (3.3%) and stayed for about one week (6.8 days), which is longer than stays by domestic tourists. Although not shown in the table, the pattern for tourists from Austria was quite similar to that for the Germans. Conversely, the majority of Dutch tourists, over 70%, stayed in non-hotels. In particular, more than 60% of Dutch tourists stayed in camping sites, contrasting sharply with patterns of domestic and German tourists. Because these accommodations are inexpensive, Dutch tourists stayed longer than tourists from any other countries (average of more than 8 days). The number of Dutch tourists who stayed in non-hotel accommodations more than doubled in the last decade. Among them, agritourism took a 3% share of the Dutch tourists, with an increase of 4.7 times from the previous decade. In short, these traits are reflected in the method of travel, since the Dutch often drive down to Italy in motor homes or by automobile. Those tourists from northern European countries come down to the sunny south in summer and tend to stay longer.

Table 10: **Inbound Tourism Demand in Italy (France and Spain)**

Country	Category	Hotel			Non-hotel			
		Four-five stars	Three stars	Hotel total	Camping site	Room/apart-ment rental	Agri-tourism	Non-hotel total
France	Total no. stays (10,000 people in 2006)	197	385	674	120	54	21	233
	% share of type of accommodation*	21,7	42,4	74,3	13,3	5,9	2,3	25,7
	06/97 ratio	1,8	1,3	1,4	1,3	4,7	4,6	1,8
	Mean duration of stay	2,6	3,1	2,9	4,8	5,1	5,6	4,4
	06/97 ratio	1,0	1,0	1,0	0,9	0,7	0,9	0,9
Spain	Total no. stays (10,000 people in 2006)	108	118	245	18	16	3	54
	% share of type of accommodation*	36,2	39,5	81,8	6,1	5,3	1,1	18,2
	06/97 ratio	3,1	2,0	2,4	1,4	7,3	8,7	2,7
	Mean duration of stay	2,1	2,4	2,3	3,4	3,7	4,5	3,3
	06/97 ratio	1,0	1,0	1,0	0,9	0,5	0,9	1,0

Source: Annuario Statistico Italiano, ISTAT
Note: *indicates % share of type of accommodation in terms of no. of stays

On the other hand, tourists from neighbouring Mediterranean Latin countries such as France, Spain, Greece, and Portugal prefer hotels to non-hotels more than tourists from northern Europe while the rates of increase in those tourists who went to agritourism facilities were higher than those who used other types of accommodation (Table 10). Among former socialist Eastern European countries, a relatively higher portion of inbound tourists stayed in apartments that enable tourists to cook for themselves and are less expensive than other facilities (Table 11). Likewise, similar characteristics were observed in tourists from other Eastern European countries, such as from Poland, Hungary, Croatia and Slovenia. In contrast, over 90% of Russian tourists stayed in hotels although agritourism showed the highest growth rate among types of accommodations (Table 11).

Table 11: **Inbound Tourism Demand in Italy (Czech Republic and Russia)**

Country	Category	Hotel			Non-hotel			
		Four-five stars	Three stars	Hotel total	Camping site	Room/apart-ment rental	Agri-tourism	Non-hotel total
Czech republic	Total no. stays (10,000 people in 2006)	13	62	96	43	70	2	121
	% share of type of accommodation*	6,2	28,6	44,2	19,8	32,4	0,8	55,8
	06/97 ratio	4,0	4,3	3,0	1,1	4,3	6,2	2,0
	Mean duration of stay	3,1	4,6	4,2	6,0	7,9	6,0	6,7
	06/97 ratio	1,0	1,3	1,1	0,9	0,9	0,6	1,0
Russia	Total no. stays (10,000 people in 2006)	122	109	244	5	8	1	18
	% share of type of accommodation*	46,6	41,6	93,2	1,7	3,1	0,2	6,8
	06/97 ratio	3,0	1,4	1,8	1,4	2,8	3,2	1,8
	Mean duration of stay	3,9	3,2	3,5	5,6	8,0	4,9	6,8
	06/97 ratio	1,0	0,8	0,9	0,9	0,7	0,5	0,8

Source: Annuario Statistico Italiano, ISTAT
Note: *indicates % share of type of accommodation in terms of no. of stays

British tourists, separated by water although a tunnel exists, definitely prefer to stay in hotels; more than 80% stay in hotels and less than 20% in non-hotels (Table 12). Because of this preference for hotels, the length of stay was 5.5 days on average in non-hotels, which is much shorter than for the Dutch, with a preference for economical accommodations. Again, agritourism's share of British tourists was very low but the rate of increase in the decade was high, by nearly three times.

Now, going beyond Europe, tourists from USA acted similarly to the British tourists, with a strong preference for hotels, but with a shorter stay; about 4 days on average in non-hotels. Demand patterns for agritourism accommodations and apartments were similar to those of other countries.

Table 12: **Inbound Tourism Demand in Italy (UK and USA)**

Country	Category	Hotel			Non-hotel			
		Four-five stars	Three stars	Hotel total	Camping site	Room/apart-ment rental	Agri-tourism	Non-hotel total
UK	Total no. stays (10,000 people in 2006)	551	449	1.084	96	68	26	220
	% share of type of accommodation*	42,3	34,4	83,1	7,4	5,2	2,0	16,9
	06/97 ratio	2,1	1,6	1,7	1,2	3,4	2,9	1,9
	Mean duration of stay	3,6	4,0	3,8	6,6	5,1	6,5	5,5
	06/97 ratio	1,0	0,9	1,0	0,8	0,6	0,9	0,8
USA	Total no. stays (10,000 people in 2006)	519	294	903	19	61	17	139
	% share of type of accommodation*	49,8	28,2	86,7	1,8	5,9	1,6	13,3
	06/97 ratio	1,3	1,2	1,2	0,8	3,5	3,1	2,3
	Mean duration of stay	2,4	2,4	2,4	5,0	4,1	4,7	4,1
	06/97 ratio	1,1	0,9	1,0	0,6	0,6	0,8	0,8

Source: Annuario Statistico Italiano, ISTAT
Note: *indicates % share of type of accommodation in terms of no. of stays

Table 13: **Inbound Tourism Demand in Italy (Japan and China)**

Country	Category	Hotel			Non-hotel			
		Four-five stars	Three stars	Hotel total	Camping site	Room/apart-ment rental	Agri-tourism	Non-hotel total
Japan	Total no. stays (10,000 people in 2004)	246	71	331	2	6	0,5	13
	% share of type of accommodation*	71,4	20,6	96,2	0,6	1,6	0,2	3,8
	04/97 ratio	0,8	0,7	0,8	0,8	2,2	2,4	1,3
	Mean duration of stay	2,0	2,0	2,0	7,8	3,1	3,3	3,2
	04/97 ratio	1,0	0,9	1,0	0,8	0,7	0,8	1,0
China	Total no. stays (10,000 people in 2004)	79	36	122	1	3	0,2	7
	% share of type of accommodation*	61,0	27,9	94,6	0,4	2,6	0,2	5,4
	04/97 ratio	8,7	6,7	7,2	5,3	9,0	16,1	9,2
	Mean duration of stay	1,6	1,8	1,7	3,2	6,6	7,9	5,0
	04/97 ratio	1,2	0,7	1,0	0,6	0,6	1,3	1,0

Source: Annuario Statistico Italiano, ISTAT
Note: *indicates % share of type of accommodation in terms of no. of stays

Among Asian countries, those Japanese tourists who stayed in non-hotels were exceptional because 96% of Japanese stayed in hotels (Table 13). Another distinctive trait is a very short visit, an average of about 3 days even in non-hotels. Their busy tour schedule was reflected in this demand pattern. Although the demand for non-hotels is rising, the number of tourists who stayed in non-hotels including agritourism facilities, is still at the negligible stage. This is probably because tourists from this region have a higher preference for urban tourism such as visiting cultural heritage sites and shopping in the city rather than agritourism in rural areas.

Although outbound tourism in China is growing rapidly with a huge potential (Guo *et al*, 2007), still the number of inbound tourists is only one third of that from Japan (Table 13). Their preference for hotels was similar to that of Japanese: 95% of accommodation demand was for hotels. By the same token, the demand for agritourism increased 16 times, but the number of tourists was still very small. Although there is not a table showing statistics for the Korean case, we can observe the same pattern for city tourism, which is a common feature among Asian tourists.

To conclude, while the preference for accommodations differed from country to another, it was commonly observed that the number of inbound tourists to agritourism facilities increased at a higher rate than to other types of accommodations in every country. Finally, it should be noted that the agritourism market in Italy has two main pillars for its growth: domestic and inbound tourists from European countries.

CONCLUSIONS

This paper mainly focused on the demand characteristics of the agritourism in Italy. Main findings are as follows:

(1) The number of beds available and tourists who stayed in agritourism facilities increased more rapidly in the last decade than for other type of facilities.

(2) Regionally, central Italy takes the largest share of agritourism while the increase in demand in the late starter south was equally large.

(3) The agritourism market has two major engines for demand growth: domestic and inbound demand. European tourists comprise the majority of this inbound demand due to the special factors that reduce barriers to tourism in European countries such as the availability of similarly developed surrounding countries, surface transportation, the introduction of common currency free from exchange risks and so on. Even if these favourable conditions are considered, in addition to the domestic demand, this fact suggests the significance of inbound demand for development of agritourism. Especially, neighbouring countries are a promising demand pool to be explored. Thus, this aspect should be well taken into account in the marketing strategy for agritourism.

(4) The limitation of this study is that issues of agritourism in Italy were not addressed fully. In this respect, further research on the country-wise demand profile and on the capability building of agritourism operators should be addressed.

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ACKNOWLEDGEMENT

This study was funded by the Grants-in-Aid for Scientific Research, no. 20248024 and no. 24658191, Japan Society for the Promotion of Science (JSPS).

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