

# イタリア・ウンブリア州におけるアグリツーリズム農家の 特性と活動

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# The Activity and Characteristics of Agri-tourism Farms : A Study of Umbria, Italy

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## Synopsis

Agri-tourism is becoming an important income source for farmers in industrial countries facing over production. However, how farming and agri-tourism activity should be integrated into farm management has not yet been fully studied. The authors think that this study is necessary for the successful introduction of agri-tourism and the stable development of pluriactive farms. We have examined the connection between the activities of agri-tourism and farming in Umbria, one of the fastest growing regions of agri-tourism in Italy. We found that farm size is closely connected with the level of agri-tourism activity ; that middle-sized farms are most active in agri-tourism, while larger farms prefer to offer apartments due to severer labour constraints, and that smaller farms tend to offer rooms to avoid heavy investment in facilities. We attribute these tendencies to variations in resource endowments largely corresponding to farm size, which impose different constraints on farms. Thus, it is important to introduce tourism activity corresponding to the managerial resource endowment which differs according to farm size. In this case support measures will also be more effective.

**Key words** : agri-tourism, diversification, farming activity, pluriactivity, farm characteristics, Italian agriculture

## I Introduction

Agri-tourism is an important type of pluriactivity, that is, farm or rural diversification (for

farm diversification, Haines and Daives<sup>13)</sup>, Gasson and Errington<sup>12)</sup>, Slee<sup>27)</sup>, Pichler<sup>24)</sup>; for rural diversification, Slee et al.<sup>28)</sup>). Its significance is often emphasised in rural development, especially in less favoured areas (Ohe<sup>19)</sup>). It is crucial for a

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stable development policy for agri-tourism to have a good understanding of the actual patterns of behaviour undertaken by agri-tourism farms and how their tourism activities relate to their farming activities. To do this we have to clarify how farmers integrate farming and tourism activity and see how this relates to the characteristics of their farm. There are precedent analyses of agri-tourism also referred to farm tourism in European countries (Bryden et al.<sup>3)</sup>, Dernois<sup>5)</sup>, Frater<sup>11)</sup>, Hoyland<sup>14)</sup>, Maude and van Rest<sup>16)</sup>, Pevetz<sup>23)</sup>, for rural tourism in a broader sense, Lane<sup>15)</sup>, and also related social science approaches have contributed to the building of a framework to clarify the significance and perspectives of agri-tourism (Evans and Ilbery<sup>7),8),9)</sup>, Pearce<sup>22)</sup>). However, so far economic analyses on the relationship between agri-tourism and the characteristics of farms have not yet been fully carried out.

The main purpose of this paper, thus, is to clarify the relationship between agri-tourism activity and the characteristics of farm, and to evaluate how farmers integrate agri-tourism activity with other farming activities. Our study focuses on agri-tourism in Umbria, central Italy, where agri-tourism is growing rapidly. Although orthodox analyses of farm management focused on conventional farming have been conducted (Ciani<sup>4)</sup>), and ad hoc description of agri-tourism in this area have been made, because agri-tourism is relatively new in this country compared with other Western European countries, a comprehensive study of the situation has not yet been undertaken.

The composition of this paper is as follows; firstly we start by briefly looking at the general characteristics of Italian and Umbrian agri-tourism. Secondly we classify agri-tourism activity into three types according to the type of accommodation offered and then examine how aspects of these three types of accommodation

relate with farming aspects. Finally, we summarise this analysis in a conceptual framework, and then we examine implications for future policy measures for agri-tourism. This paper is an extension of the work of our previous paper (Ohe and Ciani<sup>20)</sup>).

## II General Characters of Agri-tourism Activity in Italy

### 1. Characteristics of the Supply Side

Firstly we will briefly look at the general characters of agri-tourism activity in Italy because it differs from agri-tourism in other Western European countries in several aspects. The data were obtained from *Stato e Prospettive dell'agriturismo in Italia* 1994 issued by *Agriturist*<sup>1)</sup>, the largest national agri-tourism organisation in Italy.

1) The introduction of agri-tourism in Italy was later than other Western European countries because the Italian law on agri-tourism (*la legge-quadro*, 5 dicembre 1985, n. 730) was established late in 1985 (Terranostra<sup>18)</sup>). Following this regional laws were established and the number of agri-tourism farms have increased from the late 1980s.

The proportion of farms involved in agri-tourism is said to be from 3% to 5% in the other Western European countries. In 1994, only 7000 farms were involved in agri-tourism in the whole of Italy, and this proportion is expected to increase to the 3% level in the future (Agriturist<sup>1)</sup>). In short, Italian agri-tourism is in a growing stage now.

2) The Italian law clearly defines the difference between agri-tourism (*agriturismo*) and rural tourism (*turismo rurale*). Agri-tourism is defined as a tourism activity where only farming people can be involved in (Dolcini<sup>6)</sup>). Agri-tourism is the Italian term for farm tourism. Other tourism activities such as pensions, hotels and restaurants carried out by non-farming people in rural areas

are referred to as rural tourism. The law covers the former, that is, farm tourism. However, competition in rural areas between agri-tourism and rural tourism is increasing due to the development of agri-tourism. To cope with this situation agri-tourism organisations try to differentiate agri-tourism from rural tourism by emphasising on an aspect of public goods as a function of land preservation by farming, which gives them a logical base requesting public assistance (Mennella and Borghi<sup>17</sup>)

3) Italian society has an abundant regional culture and agri-tourism in Italy takes on the flavour of these regional cultures. For instance, farmhouse accommodation for skiers in winter in Alto Adige, Trentino-Alto Adige of the Italian Alps, was one of the earliest developments in agri-tourism in Italy, and was greatly influenced by Austrian agri-tourism due to the majority of German speaking inhabitants in this region (See Figure 1).



Fig. 1 Location of the Study Area

On the other hand, in Tuscany (*Toscana*), in central Italy, a large number of farmers left rural areas due to the dissolution of the traditional share-cropping system (*mezzadria*) during the high economic growth period following the Second World War (Fabiani<sup>10</sup>, Sakai<sup>26</sup>). Consequently agri-tourism was promoted in this area to preserve traditional farming houses and rural cultural assets.

Furthermore, in southern Italy there is a region in which agri-tourism has developed, like Puglia. The potential for agri-tourism is not low, but generally remnants of the feudal system of rural estate (*latifondo*) still remains. So the development of agri-tourism in this area is expected in the future.

The share of farms involved in agri-tourism in the three regions of Italy is ; in the north 46%, the central 41%, and the south 14%. Thus, the north has the largest share. However in terms of number of beds, the central area has the highest share ; the north being 34%, the central 46%, and the south 20%. This difference comes from the number of beds per farm. Like in other European countries there is an upper limit on the number of beds for individual agri-tourism farms in Italy. However as this limit is not defined by the national law, but by the regional law, upper limits differ from region to region. For example, the legal limit is 30 beds in the central regions like Tuscany and Umbria, while in Alto Adige, the northern region, the limit is 12 beds. Thus the central limit is 2.5 times larger than the northern limit. The actual average number of beds is 18.4 beds in Tuscany, while 11.3 in Alto Adige. In Austria, Italy's northern neighbour, agri-tourism is clearly defined as a side business, and the upper limit is 10 beds. This influences the styles of agri-tourism in northern Italy. Thus the regional character is reflected in the actual definition of agri-tourism.

In contrast, in spite of agri-tourism also being

defined as a side business, there is much room for development actually as a main business in the central region since the upper limit is set much higher. Therefore in general, we can define agri-tourism in the north as a side-business type, and that in the central region as a main-business type.

Furthermore, we can see differences not only in the number of beds, but also in the variety of the activity itself. For example, the portion of agri-tourism farms offering horse riding is 27% in the central regions, but 16% in the north and being as low as 6% in Alto Adige. Concerning the direct sale of farm products to guests, 82% of farms in the central sell products compared with 69% of farms in the north.

In short, agri-tourism in the central region is more active than in other regions.

## 2. Characteristics of the Demand Side

In this section we examine the characteristics of the demand side. First, Table 1 shows which Italian visitors visited which region of agri-tourism, and clearly reveals that visitors from every region mainly visited agri-tourism in the central. Fifty-seven percent of visitors from the north visited agri-tourism in the central, 48% of central visitors visited the central regions and 35% visited the north, and 55% from the south visited the central region. Thus, we can confirm again that the most active area of agri-tourism in Italy is the central region. This is because, as mentioned earlier, the number of beds is largest in this region, especially in Tuscany and Umbria.

**Table 1** Inter-regional transfer of Italian agri-tourism visitors (Unit : %)

Area of origin	Area visited				Total
	North	Central	South	Unknown	
North	25	57	18	—	100
Central	35	48	17	—	100
South	10	55	31	4	100

Source : *Stato e Prospettive dell'agriturismo in Italia, Agriturist* 1994.

**Table 2** Characteristics and attitudes of Italian visitors

Question	Reply	%
Primary reasons of visit	Seek tranquillity	48
	Interest in nature	18
	To cut expenses	15
	Curiosity	9
	Interest in rural culture	8
	To learn about farming	2
	No other accommodations	1
	Total	100
Length of stay	Up to 3 days	23
	From 3 to 10 days	49
	From 10 to 20 days	23
	Over 20 days	5
	Total	100
Unit of party	Up to 2 persons	39
	From 3 to 5 persons	45
	From 6 to 10 persons	13
	Over 11 persons	3
	Total	100
Types of facility utilised	Room	52
	Apartment	46
	Camping site	2
	Total	100
Price of accommodation	Expensive	10
	Reasonable	58
	Cheap	32
	Total	100

Source : See Table 1.

Note : The sum of replies is not always equal to 100 due to round errors.

Next, we see the primary reasons for visiting in Table 2. The largest number of respondents selected "tranquillity of country-side". nearly half of the total (48%) ; and other reasons were, in following order ; interest in nature (18%), lowering expenses (15%), interest in rural culture (8%), and curiosity (9%).

In contrast, the portion of visitors who said they were interested in agriculture was only 2%. These results indicate that people visit agri-tourism seeking rural amenities rather than to pursue interests in agriculture itself. This is probably because they seek what they cannot obtain in urban life. However, nearly nine tenths of respondents said that encountering farming life was

heart warming, which indicates that experiencing farming life works as an important factor for making their stay impressive even though it is not the main purpose of their visit.

Concerning the average length of stay of Italian visitors, nearly half of the respondents (49%) stayed between three and ten days. Secondly, visitors staying less than three days and between 10 and 20 days were 23% respectively. Thus, visitors tend to spend long vacations in agri-tourism. The most popular season being summer.

Concerning the unit of visitors, 45 % of visitors came in groups of three to five persons. Secondly, two persons or couples made up 39%. Thus, families and then couples are the main types of visitors.

Concerning type of accommodation there are two main types ; rooms 52% and apartments 46%. Visitors can enjoy more independence staying in the apartments than that in rooms because apartments often are equipped with a kitchen and are thus more private. The choice in the type of accommodation depends on the preference of the tourists. Tourists can obtain information about what kind of services they can expect in the agri-tourism farms beforehand from guidebooks issued by national organisations and regional governments.

Finally, concerning the price of accommodation, 58% said that prices were reasonable, while 32 % said prices were cheap. In general there seemed to be no major dissatisfaction concerning prices.

We can summarise the demand characteristics by saying that visitors do not primarily seek farming experiences or knowledge on agriculture when they visit, but the farming life works effectively to give them a good impression of their farm stay.

### III Characteristics of Agri-tourism Farms in Umbria

Umbria is a region in central Italy and the eastern part of which consists of the Apennines (*Appennino*). Due to the deep green rural landscape, this region is often called the "Green Heart", *Cuore Verde*, of Italy (Figure 1). The famous town of Assisi or *San Francesco*, which attracts many tourists from abroad as well, is also located in this region. However, compared with neighbouring Tuscany which is renown worldwide for its Renaissance cultural assets, Umbria receives less visitors. Tuscany is the most advanced region in terms of quality and quantity of agri-tourism due to its abundant cultural assets. The level of agri-tourism in Umbria has increased since the regional law (*la legge regionale 6 agosto 1987, n. 38*) was passed in 1987 (Terranostra<sup>18)</sup>), and Umbria now follows Tuscany although its agri-tourism is based more on rural resources.

#### 1 . Types of Agri-tourism Activity and the Characteristics of Farms in Umbria

Our analysis is based on data on agri-tourism farms published in *Agriturismo Umbria Ospitalità* 1994, issued by the Umbria Regional Government (*Regione Dell'Umbria*) in 1994. In Umbria 181 farms were involved in agri-tourism activity as of 1994 (for the results of an interview survey of 26 farms in Umbria, see Ohe and Ciani<sup>21)</sup>). Umbria is a hilly and highland area and the average altitude of these farms is 411 meters above sea level. Farms had an average of 5.5 rooms, 3.1 apartments, and 13 beds. Thirty-nine percent of farms offered rooms only, 49% apartments only, and 12% offered both rooms and apartments.

The average size of farms including forest area was 68.5 ha. We cannot exclude forest area because it is included in the definition of farm size

in Italy, so we have to recognise that a bias might be included in the farm size of higher altitude farms because these farms tend to have more forest area than farms in flat areas. The largest farm covers an area of 1100 ha while the smallest covers only 2 ha. Agri-tourism farms tend to be much bigger than 11.7 ha, the average size of farms in this region. This suggests that it is easier for bigger farms to undertake agri-tourism activity than it is for small farms. This does not necessarily mean that small farms cannot become involved in agri-tourism. We would like to study this topic further in the latter part of this paper.

We have classified agri-tourism activity in terms of the type of accommodation offered because accommodation is the main activity of agri-tourism. According to this classification we will look into the relationship between the characteristics of each type of tourism activity and farming. (For the recent details on Umbrian agriculture, see Bock<sup>2)</sup> who examines the role of

women in Umbrian farming and includes a discussion on agri-tourism).

We define the types of accommodation as follows ; apartments only is *type I*, rooms only is *type II*, and both apartments and rooms is *type III*. This classification generally signifies different levels of tourism activity as well. In general *type I* apartment accommodation is generally labour saving but requires more capital for kitchen and other facilities which means more investment for farms. In contrast, it is relatively easier to start renting out rooms since this requires less investment. *Type III* accommodation, that is rooms and apartments, is considered the most active type.

Table 3 confirms this fact showing that *type III* farms have the highest average number of beds, 18.3, while *type II* farms offer the smallest lowest number of beds, averaging 11.6 beds per farm. Another point we cannot miss from Table 3 is that there are not major differences of altitude among the tree types although the location of *type*

**Table 3** Agri-tourism in Umbria

	Total/ overall average	<i>Type I</i> (Apartments)	Farm type <i>Type II</i> (Rooms)	<i>Type III</i> (Apartments+rooms)
No. of farms	181	88	71	22
Average altitude (m)	410.9	392.2*	433.5 <sup>+</sup>	411.4 n.s.
Average no. of apartments	3.1	3.3**	—	2.4**
Average no. of rooms	5.5	—	5.6 n.s.	5.3 n.s.
Average no. of beds	13.0	12.9 n.s.	11.6**	18.3***

Source : Regione Dell'Umbria, *Agriturismo Umbria Ospitalità* 1994.

Note : Significant level \*\*\* ; 1%, \*\* ; 5%, \* ; 10%, +; 20% (as a reference), n. s. ; not significant.

**Table 4** Type of accommodation and farm size

Farm size	Average	<i>Type I</i>	<i>Type II</i>	<i>Type III</i>
1-9ha	(%) 19.9	12.5	29.6	18.2
10-49ha	(%) 50.3	52.3	45.1	59.1
50ha <sup>-</sup>	(%) 29.8	35.2	25.3	22.7
Total	(%) 100.0	100.0	100.0	100.0
Average	(ha) 68.5	87.5*	53.7 n.s.	40.8**
Coefficient of variance	(%) 198.9	186.1	214.1	120.9

Source : See Table 3.

Note : See Table 3.

I farms is slightly lower than other two types. This suggests that the bias of the farm size caused by inclusion of forest area is not so serious among these types.

One of the most interesting factors we can see from Table 4, is that the average size of farms is largest for *type I*, averaging 87.5 ha, while *type III* farms have the lowest average size of 40.8 ha. The average size of *type I* farms is more than twice that of *type III* farms. When looking at this we have to also keep in mind that there is a large variance in the sizes of Italian farms.

Examining the connection between farm size and type of agri-tourism accommodation further, we see from Table 4 that *type I* farms have a comparatively high percentage of over 50 ha farms, *type II* farms have a comparatively more farms of less than 9 ha, and there is a larger percentage of *type III* farms in the 10 ha to 49 ha class. Thus although a large variance in size remains in each type, we may classify *type I* as corresponding to larger-sized farms, *type II* to smaller-sized farms, and *type III* to middle-sized farms.

Table 5 shows us the degree to which agri-

tourism farms are involved in various farming activities including ; wood, olives, vineyards, cereals, forage, pasture, and fruit. These are the typical components of Umbrian agriculture. Concerning livestock, horses are the most common livestock keep on agri-tourism farms to provide rides for guests.

We can also see a correspondence between agricultural production and farm sizes. We can see that *type I* farms tend to be involved in less intensive farming due to the large amount of land that must be taken care of. We think this may also be one of the reasons why these farms tend to concentrate on apartments which generally require less intensive care of guests than rooms. This may be a response to more severe labour constraints. *Type II* generally involves the most intensive farming such as the production of vegetables, fruit and livestock. *Type III* farms show a significantly higher involvement in cereals and vegetables, and in general a lower involvement in livestock. They also show a slightly higher involvement in olives and wine, though this is not significant statistically. In general, *type III* farms maintain the typical features of Umbrian agricul-

**Table 5** Farming and types of accommodation

Crops and livestock			Average	<i>Type I</i>	<i>Type II</i>	<i>Type III</i>	$\chi^2$ test
Crops	Wood	(%)	71.3	70.5	71.8	72.7	n.s.
	Olive	(%)	68.0	69.3	62.0	81.8	n.s.
	Vineyards	(%)	55.8	53.4	54.9	68.2	n.s.
	Forage	(%)	54.1	55.7	54.9	68.2	n.s.
	Pasture	(%)	47.5	43.2	53.5	45.5	n.s.
	Cereals	(%)	57.5	63.6	45.1	72.7	**
	Vegetables	(%)	16.6	9.1	23.9	22.7	**
	Fruit	(%)	6.1	3.4	11.3	0.0	*
Livestock	Beef cattle	(%)	16.6	17.0	18.3	9.1	n.s.
	Horses	(%)	34.3	19.3	47.9	0.5	***
	Sheep	(%)	21.5	12.5	31.0	27.3	**
	Goats	(%)	16.0	10.5	23.9	13.6	*
	Pigs	(%)	15.5	8.0	25.4	13.6	**
	Farm yard animals	(%)	7.7	4.5	12.7	4.5	+

Source : See Table 3.

Note : See Table 3.



ture.

To sum up, *type I* tends to incorporate larger farms involved in less intensive farming, *type II* smaller farms with intensive farming, and in between, *type III* incorporates medium-sized farms with the intermediate level of intensive farming and maintains the typical style of Umbrian farming.

## 2. Facilities and On-farm Sales of Products

Table 6 indicates the kinds of facilities agri-tourism farms provide. On the whole, the most common facilities are heating and telephones. Table tennis is also a common indoor facility for entertainment due to its space saving character. As for outdoor facilities, 65% of farms have walking paths, followed by playgrounds, and horse riding. Twenty five percent provide swimming pools, less than 10% tennis courts, so we can say that these two are not common facilities of agri-tourism farms in this region probably due to the necessity for an extra investment.

We can easily observe a significant difference

among the types of farms in terms of in-door facilities. *Type I* farms provide fewer indoor facilities such as heating, telephones, saloons, and TVs, whereas *type II* and *III* farms are more well equipped.

Concerning outdoor entertainment facilities, more *type II* farms provide horse-riding and walking paths, whereas more *type I* farms offer mountain bicycles which require less intensive care by the farm staff than horse riding. *Type III* farms are generally well equipped in every aspect, with an especially higher proportion providing kitchen facilities which enable guests to cook by themselves. The average number of facilities provided by *type I* farms is 4.6, 5.5 for *type II*, and 5.7 for *type III*. Thus, *type I* farms tend to be least equipped and *type III* the most.

Concerning on-farm sales of products as shown in Table 7, less than one fifth (18%) of farms do not sell any products. In other words, over 80% of the farms sell some products to their guests. This means that direct sales of farm products have become an important income source for farmers.

Table 6 Facilities and types of accommodation

	Facility	Average	Type I	Type II	Type III	$\chi^2$ test
	No facilities	(%) 3.3	5.7	1.4	0.0	n.s.
Indoor	Heating	(%) 89.5	83.0	95.8	95.5	**
	Telephones	(%) 80.1	69.3	91.5	86.4	***
	Saloon	(%) 43.6	31.8	54.9	54.5	***
	TVs	(%) 36.5	27.3	45.1	45.5	**
	Table tennis	(%) 34.3	37.5	28.2	40.9	n.s.
	Kitchen	(%) 3.9	2.3	1.4	18.2	***
Outdoor	Walking path	(%) 64.6	58.0	70.4	72.7	+
	Playground	(%) 30.9	27.3	36.6	27.3	n.s.
	Horse riding	(%) 29.3	14.8	46.5	31.8	***
	Swimming pool	(%) 25.4	26.1	23.9	27.3	n.s.
	Bowling	(%) 18.8	19.3	16.9	22.7	n.s.
	Mountain bicycles	(%) 18.8	26.1	9.9	18.2	**
	Tennis	(%) 9.9	9.1	12.7	4.5	n.s.
	Fishing	(%) 9.9	11.4	8.5	9.1	n.s.
	Archery	(%) 7.2	8.0	5.6	9.1	n.s.
	No. of facilities	5.1	4.6**	5.5*	5.7 <sup>n.s.</sup>	<i>t</i> test

Source : See Table 3.

Note : See Table 3.

**Table 7** On-farm sales of farm products

Product		Average	Type I	Type II	Type III	$\chi^2$ test
No products	(%)	18.2	21.6	18.3	4.5	+
Olives	(%)	52.5	52.3	46.5	72.7	*
Wine	(%)	50.3	53.4	42.3	63.6	+
Vegetables	(%)	14.4	14.8	9.9	27.3	+
Fruit	(%)	8.8	11.4	8.5	0.0	n.s.
Eggs	(%)	9.4	8.0	11.3	9.1	n.s.
Poultry	(%)	9.4	8.0	8.5	18.2	n.s.
Cheese	(%)	8.3	8.0	9.9	4.5	n.s.
Salami	(%)	3.9	2.3	7.0	0.0	n.s.
Honey	(%)	19.3	19.3	16.9	27.3	n.s.
Jam	(%)	17.1	8.0	26.8	22.7	***
Truffles	(%)	3.3	2.3	2.8	9.1	n.s.
No. of products		2.1	2.0 <sup>n.s.</sup>	2.1 <sup>n.s.</sup>	2.7**	<i>t</i> test

Source : See Table 3.

Note : See Table 3.

**Table 8** Price of rooms in type II and III farms

Room		Type II	Type III	$\chi^2$ test
Single	(1000 Lire)	31.6	40.2	**
Single + shower/bath + half board	(1000 Lire)	74.2	63.5	*

Source : See Table 3.

Note : See Table 3.

Wine and olive oil are the most common items of this region. Farmers can make their own wine (This is not permitted in Japan) and can serve it to their guests. Farmers usually have processing, such as the pressing olives and bottling of the oil done outside the farm. The oil is then sold under its own brand, and is also used in cooking for guests. Other products include honey, jam and salami. We can, thus, point out another important character of agri-tourism activity, that farmers can sell their own products and serve them directly to their guests. This activity creates the individual identity of each farm and enables them to attract guests from urban areas.

Regarding the tendencies of the three types of farms, *type III* farms are most active in selling their own farm products on their premises. On the contrary, about one fifth of *type I* farms do not

sell any of their products to guests. The average number of farm products for sale is 2.0 for *type I* farms, 2.1 for *type II*, and 2.7 for *type III*.

In short, *type III* farms tend to be most active in agri-tourism whereas *type I* farms the least active.

### 3 . Prices of Accommodation

We will examine the prices of accommodation here. Although 25 % of *type II* and 36% of *type III* farms provide rooms with breakfast only. In other words, about 70% of these agri-tourism farms also offer lunch or dinner reflecting Italian dining customs. This tendency is not so common in central European countries. In agri-tourism farms in German speaking countries, for example, bed-and-breakfast style accommodation is common. Thus, this tendency reveals one aspect of the

Mediterranean cultural background of Italian agri-tourism, the common practice of providing meals for guests. In this case guests are not shown a menu like they would be in an urban restaurant, but are served the meal available at the time.

Table 8 shows the price of rooms in *type* II and III farms. Single rooms in *type* III farms are more expensive than *type* II rooms probably due to more investment in facilities. However, rooms with a shower or bathroom and board are on the average more expensive in *type* II farms. This suggests that *type* II farms have more severe resource constraints when it comes to offering board services than *type* III farms, so we need to look into this in more detail next.

#### 4. Board Offered by Type II Farms

In this section, taking Italian dining habits into consideration, we will compare the differences in characteristics of *type* II farms which offer board and those which do not. We call farms which offer board *type* II *b*, and those that do not, *type* II *nb*. As clearly shown in Table 9, farms which do not offer board (*type* II *nb*) tend to be much smaller than farms which do (*type* II *b*), that is 15.2 ha compared with 67.7 ha. The number of rooms and

beds offered by *type* II *nb* farms is also lower. Thus, smaller farms tend to offer rooms without board. From the point of view of farming activity, *type* II *nb* farms tend to conduct less extensive farming. They are significantly less involved in wood, forage, pasture, and horses, but are slightly (although not significantly) more involved in orchards, nurseries and farmyard animals.

These smaller farms also offer fewer facilities in general. The average number of facilities is 4.2 for *type* II *nb* farms compared with 6.0 for *type* II *b* farms (Table 10). *Type* II *nb* farms also sell fewer farm products. The average number goods for sale to guests is 1.6 for *type* II *nb* farms and 2.3 for *type* II *b*, but this difference is not statistically significant.

To clarify the price difference between these two types, we would like to look at the prices of rooms without board. Table 11 shows that there is a significant difference in price between *type* II *nb* and II *b* rooms. *Type* II *b* farms tend to offer more expensive rooms. This difference may be attributed to the financial capacity of *type* II *b* farms which allows them to invest in more facilities.

Thus, small farms generally do not have enough

**Table 9** Size and farming in type II farms

Size and farming		<i>Type</i> II <i>b</i>	<i>Type</i> II <i>nb</i>	<i>t</i> test / $\chi^2$ test
Offers board		Yes	No	-
Sample size		52	19	-
No. of rooms		6.0	4.4	**
No. of beds		12.8	8.3	***
Farm size	(ha)	67.7	15.2	***
Wood	(%)	76.9	57.9	+
Forage	(%)	59.6	42.1	+
Pasture	(%)	61.5	31.6	**
Orchard	(%)	9.6	15.8	n.s.
Nursery	(%)	15.4	21.1	n.s.
Farmyard animals	(%)	11.5	15.8	n.s.
Beef cattle	(%)	21.2	10.5	n.s.
Horses	(%)	61.5	10.5	***

Source : See Table 3.

Note : See Table 3.

**Table 10** Facilities in type II farms

Facility		Type II <i>b</i>	Type II <i>nb</i>	$\chi^2$ test
Heating	(%)	98.1	89.5	+
Telephones	(%)	96.2	78.9	**
TVs	(%)	50.0	31.6	+
Walking path	(%)	78.8	47.4	**
Horse riding	(%)	55.8	21.1	***
Table tennis	(%)	32.7	15.8	+
Swimming pool	(%)	28.8	10.5	+
Mountain bicycles	(%)	13.5	0.0	+
No. of facilities		6.0	4.2	***( <i>t</i> test)

Source : See Table 3.

Note : See Table 3.

**Table 11** Price of type II rooms

Room	Type II <i>b</i>	Type II <i>nb</i>	<i>t</i> test
Single with shower/bath (1000 Lire)	49.3	35.1	**
Double with shower/bath (1000 Lire)	77.8	57.3	**

Source : See Table 3.

Note : See Table 3.

finance and therefore cannot provide facilities for tourists. They are often involved in labour consuming intensive farming which makes their agri-tourism activity more reserved.

#### IV. Discussion

The above analysis clarified that agri-tourism activity in Umbria is on a larger scale than the Italian average and incorporates a variety of activities. Middle-sized farms are most active in terms of agri-tourism activity. Hereafter we summarise the main generalisations of the relationship between farming and agri-tourism activity based on our conceptual model. Figure 2, 3 and 4, illustrate the production frontiers of the three types measuring the level of farming activity horizontally and agri-tourism vertically. For easy comparison, isorevenue lines (*I*) are assumed to be identical. The frontiers are longer horizontally because the level of agri-tourism cannot exceed that of farming from the definition as a side-

business. In each type, an equilibrium point is illustrated at *e* where the indifference curve of urban tourists (*U*) touches the farm's production frontier (*F*).

First, Figure 2 illustrates the frontier of *type I* farms which are mainly large farms. *Type I* farms tend to have more vacant facilities succeeded from former generations available for the purpose of tourism activities. They also have less financial constraints than small farms. However, incentive to start agri-tourism is not always so high because they can earn enough income to support themselves from farming alone which is often taking an extensive style. Generally a large amount of their resources are already committed to farming activities, and they face tighter labour constraints concerning both family and hired labour when entering new businesses. This makes it difficult for them to input supplement labour into labour intensive tourism activities. Thus, the shape of the frontier is much longer horizontally. Consequently, these farms tend to choose apart-

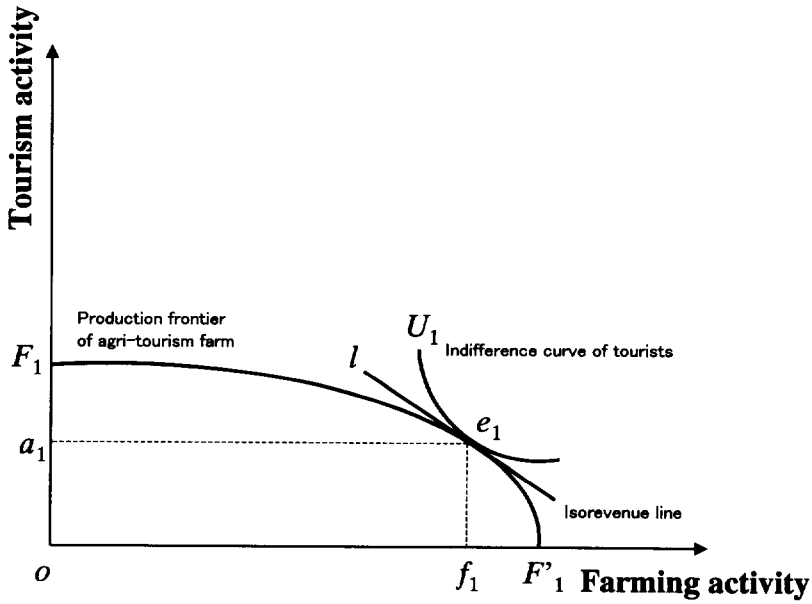


Fig. 2 Activity of Agri-tourism Farm (large farm size)

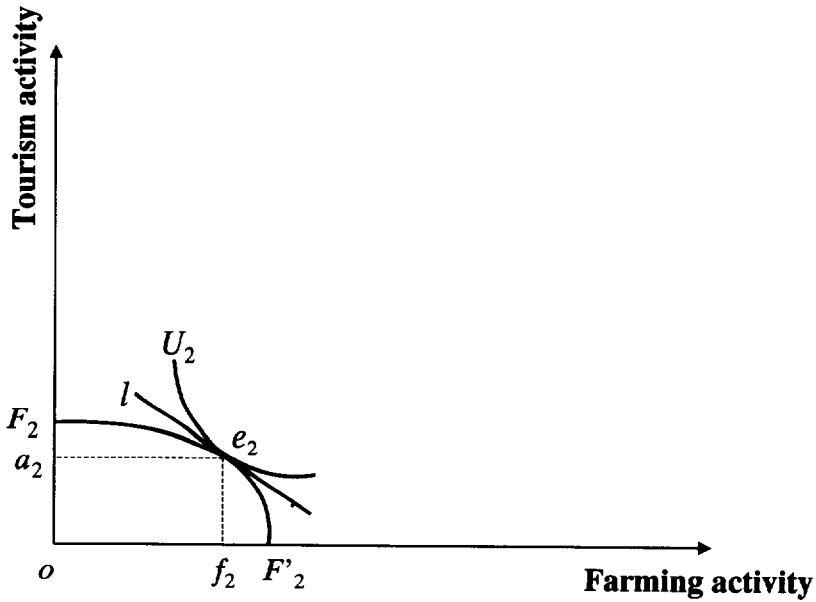


Fig. 3 Activity of Agri-tourism Farm (small farm size)

ments which are more labour saving than rooms.

Secondly, Figure 3 illustrates the frontier of *type II nb* farms which are mainly small farms. Most of these farms use family labour for farming

(*coltivatore diretto*) and labour constraints are not as severe as large farms. However, the availability of vacant facilities and financial constraints place limitations on these farms. In addition,

when farmers also hold off-farm jobs to sustain a living due to the small size of their farm, developing tourism activities is not so easy. Competition is especially severe in the summer tourist season when they are also busy with intensive farming which enables them to earn more income per farmland due to the small size of their farm. Thus, the frontier shape is slightly longer horizontally although the weight of tourism is higher than for *type I*. These farms prefer to offer rooms in the main farmhouse because this is more cost saving than offering apartments with cooking facilities.

Finally, Figure 4 for *type III* and *type II b* farms, mainly corresponds to middle-size farms which are usually based on family labour and temporarily hired labour. Relatively these farms do not face severe constraints in terms of farm resources. However, they are very sensitive to reductions in the price of farm products and cut backs in production levels due to production surpluses in the EU because they produce cereals, wine and olive which are also the main pillars of

local farming. Thus, these farms have to have a greater incentive to enter new businesses, so they can mobilise their farm resources from farming to tourism activity more smoothly and balance their resource allocation between these two activities. Consequently, they are able to become more involved in tourism activities. If they have a good business sense, they can take on agri-tourism as a rural version of the Italian tradition of family business seen in the industrial sectors and referred to as “flexible specialisation” by Piore and Sabel<sup>25)</sup>. Farms in this class have the highest potential in this direction.

The above generalisations are based on the conceptual model which emphasises the significance of the development of pluriactivity properly based on the resource constraints of farms. We do not deny that other types of managerial responses could be undertaken. The important point here is that an understanding of the resource endowment of farms is necessary for the appropriate introduction of and the stable development of agri-tourism

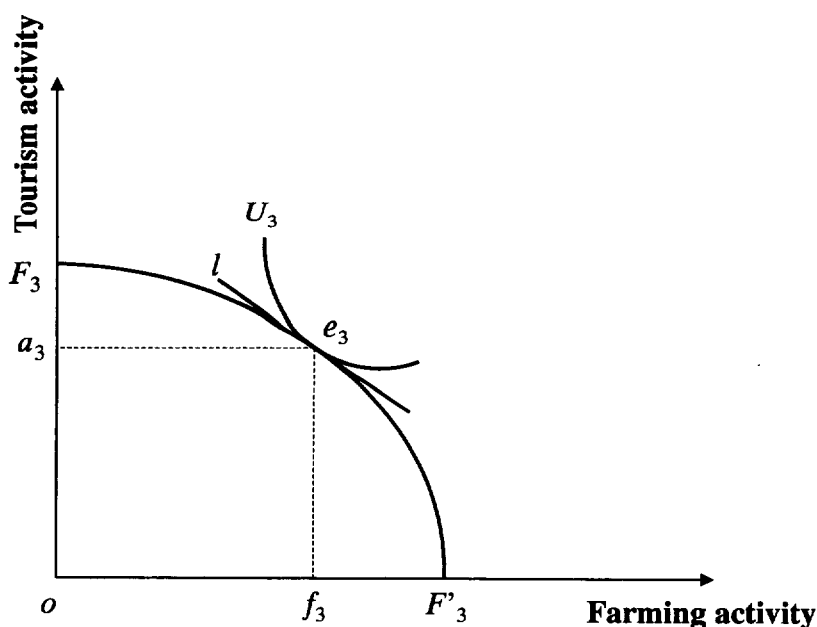


Fig. 4 Activity of Agri-tourism Farm (middle farm size)

activity. Thus, support measures to ease these resource constraints based on the understanding of the resource endowments of the different sized farms will contribute to sustainable rural development in the future.

## V Conclusions

In this paper we have examined agri-tourism activities in Umbria according to the type of accommodation offered. We found that agri-tourism activities are determined by farm characteristics. One of the most important factors is farm size. It cannot be denied that farm size often determines both farming activity and agri-tourism activity. The findings we clarified here are as follows ;

- 1) We classified agri-tourism farms into three types, I, II and III, according to the type of accommodation offered : apartments, rooms, and both rooms and apartments, respectively. In general, *type I* farms tend to be larger farms, *type II* smaller farms, and *type III* middle-sized farms, although there is some variation in farm size in all groups.
- 2) *Type III* farms are generally well equipped with facilities and more eager to sell farm products than other types of farms. *Type I* farms generally provide less facilities and sell fewer farm products. Labour constraints are considered to restrict these farms from expanding their activities.
- 3) Of *type II* farms, farms which offer board services tend to be bigger farms while the farms which do not offer board tend to be smaller. Some of the factors that deter smaller farms from offering board include more the severer financial constraints, the lower availability of vacant facilities, and the tendency to adopt labour intensive farming which takes up a large part of the family labour. Consequently the degree of agri-tourism activity of these smaller

farms is often lower than that of bigger farms.

- 4) In general we can say that middle-sized farms are most active at integrating agri-tourism into their existing farming activity. Thus, we saw that the managerial resource endowments of farms are closely related to the size of farms, and that it is important to encourage the appropriate introduction of agri-tourism activity according to the managerial resource endowment of the farm. These factors should be taken into account when considering support measures, for instance, to assist smaller farms to be able to meet the shifts in the demands of tourists, and allow middle-sized farms to integrate various tourism-related activities into farm management appropriately.

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## Summary

Agri-tourism is becoming an important income source for farmers in industrial countries facing over production. However, how farming and agri-tourism activity should be integrated into farm management has not yet been fully studied. The authors think that a detailed study of this is necessary for the successful introduction of tourism activity and for the stable development of pluriactive farms. For this purpose we have to clarify how farmers integrate farming and tourism activity and to clarify how this differs in relation to the farm characteristics. From this point of view, we have examined agri-tourism activities according to the types of accommodation offered, in Umbria, central Italy, where agri-tourism is growing rapidly. We found that the levels of agri-tourism activity are closely related to farm size. The findings we clarified are as follows ;

- 1) We classified agri-tourism farms into three types, I , II and III, according to the type of accommodation offered : apartments, rooms, and both rooms and apartments, respectively. In general, *type I* farms tend to be larger farms, *type II* smaller farms, and *type III* is middle-sized farms, although there is some variation in farm size in all groups.
- 2) *Type III* farms are generally well equipped with facilities and more eager to sell processed farm products than other types of farms. *Type I* farms generally provide less facilities and have lower sales of farm products. Labour constraints are considered to restrict these farms from expanding their activities.
- 3) Of *type II* farms, farms which offer board services tend to be bigger farms while the farms which do not offer board tend to be smaller. The main reasons for this are the severer financial constraints, the lower availability of vacant facilities, and the tendency to adopt labour intensive farming which takes a large part of the family labour of smaller farms. Consequently the degree of agri-tourism activity of these smaller farms is often lower than that of bigger farms.
- 4) In general we can say that middle-sized farms are most active at integrating agri-tourism into their existing farming activity. Thus, it is important to take into consideration the differences in the managerial resource endowment of farms which is closely related to farm size when considering the introduction of tourism activity, and these differences should also be taken into account when considering support measures.

## イタリア・ウンブリア州におけるアグリツーリズム農家の特性と活動

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### 摘 要

アグリツーリズムは過剰生産に直面している先進工業国の農家にとって、重要な所得源として注目を集めている。しかし、農業生産活動と新たなアグリツーリズム活動をいかに経営内で調和させるかという点は、アグリツーリズムの安定的な発展および多面的活動農家の育成にとって重要な点であるが、これまで十分な解明がなされていない。この点を明らかにするためには、どのような農家特性のもとでアグリツーリズムおよび農業生産がいかに経営内で統合化されているのかを明らかにする必要がある。

そこで本稿では、アグリツーリズムが成長期にあるイタリア中部のウンブリア州を対象にして、181戸のアグリツーリズム農家のツーリズム活動と農業生産要因との関係を分析した。その結果、農業経営規模が、農業生産面のみならず、ツーリズム活動をも最も大きく規定している要因の一つであることが明らかとなった。

本稿の分析で明らかにされた論点は以下のとおり。

- 1) 宿泊サービス提供の形態の違いに着目し、アグリツーリズム農家を次の3タイプに区分した。すなわち、アパートメントのみをタイプI、部屋のみをタイプII、そしてアパートメントと部屋をタイプIIIとした。経営規模との関連を分析した結果、イタリア農業の特徴である規模格差の大きい点に留意する必要があるものの、大まかにタイプIは大規模経営、タイプIIは小規模経営、タイプIIIは中規模経営の階層区分と対応していることが明らかとなった。
- 2) 総じて、他のタイプよりも施設設備が充実しており、農産加工品をより積極的に販売している農家はタイプIIIである。これに対して、タイプIの農家は、施設設備や農産加工品の販売も控えめである。これは、家族労働が制約となり、拡大を困難としているためと考えられる。タイプII農家の活動水準は両者の中間的な位置にある。
- 3) タイプIIの農家について、食事サービスを提供しているか否かでさらに二つに区分してその規模との関係を分析した。その結果、食事を提供していない農家の農場規模は提供している農家より小さく、アグリツーリズムの活動水準も低くなっている。両者の違いは、小規模農家では資金調達能力や転用可能な遊休施設に制約があることや、すでに労働集約的な農業形態を採っている点が指摘できる。
- 4) 総括すると、中規模農家は農業生産活動に新たなアグリツーリズム活動を導入することに最も積極的である。以上から、経営規模階層の違いによる経営内の資源賦存状態とそれによる制約を的確に認識することが、アグリツーリズム活動の導入に当たって重要であり、そうした認識に基づく支援策が今後講じられる必要がある点を指摘できる。