



STAY

Still Tourism Around Yard

NATIONAL REPORT OF AGROTOURISM IN ITALY

April 2023

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CONTENTS

1. Origins of agrotourism in Italy	1
1.1 An overview of agrotourism in Italy	1
1.2 Funding and opportunity for the agrotourism sector	6
2. Legislation and regulation	13
2.1 What is an agrotourism activity according to the legislation?	13
2.2 What are the requirements for the agrotourism?	22
2.3 What are the financial and management of an agrotourism activity?	28
3. Relevant data regarding agrotourism	29
3.1 Number of agrotourism	29
3.2 Demand	34
3.3 Trends and needs of the hosts	36
3.4 Digitalization on the agrotourism sector	38
4. SWOT Analysis	40
References	44
Other sources	45

1. Origins of agrotourism in Italy

1.1 An overview of agrotourism in Italy

The first agrotourism activities in Italy have been in operation since the 1950s with the emergence of nature- and landscape-oriented tourism. This form of tourism, also known as rural tourism, was the driving force for the development of rural areas and represented an important source of income. From a regulatory point of view, agrotourism first appeared in 1973 with Law no. 11 of 20 March 1973 of the Autonomous Province of Trento ('Interventions in favour of agrotourism'), followed in 1975 by Regional Law no. 21 of 31 January 1975 of the Veneto and Regional Law no. 53 of 5 June 1975 of Campania. The purpose of these regional laws was to encourage farmers to develop tourist activities through a receptive offer, which was, however, unrelated to agricultural activity (Nazionale, 2016).

In 1975 the European Community issued Directive no. 268/1975 'on mountain and hill farming and certain less-favoured areas' where the connection between agricultural activities and tourist and craft activities was indicated as an opportunity to support the incomes of agricultural enterprises.

In Italy, the first national law on agrotourism appeared in 1985 (Law 730/1985).

Law no. 730 defined agrotourism at the state level as: *'reception and hospitality activities carried out exclusively by individual or associated farmers', i.e., those who carry out one of the following activities: cultivation of the land, forestry, animal husbandry and related activities.*

In all these years since the adventure of agrotourism began, and with it the legislative process to regulate its various aspects, the legislator's main objective has been to **support agriculture**, enabling the farmer to combine traditional activities with new income opportunities in other sectors such as the social and environmental ones. The agrotourism activity is in fact **closely correlated** with the protection and enhancement of specific territorial resources.

It encourages:

- the maintenance of human activities in rural areas;
- soil protection initiatives and the recovery of the rural building heritage;
- typical, quality production and related food and wine activities.

The role of agrotourism in the rural sector and in the economic system

In recent decades, the role of the farm has been transformed from a simple production activity to a strategic social and economic player. Today, agriculture is conceived as a multifunctional and multifaceted sector that, in addition to producing basic necessities, is able to produce services aimed at increasing the social welfare of the community.

Italian farms are increasingly linked to the economy of the territory in which they operate and, in this key, **agrotourism** acts as a unifying element, integrating agricultural production with hospitality

and the organisation of cultural activities. This link is felt more in rural and mountain areas (**Photo 1**) where the boundary between town and country becomes more blurred and farms do not merely represent an economic activity but take on roles and functions of a social and environmental nature. (Santucci, 2013)



Photo 1- San Gimignano, famous in terms of tourism, maintains a deep connection with the surrounding area, which, together with its buildings and ancient towers, is responsible for the village's fame.

Agrotourism in recent decades has become one of the best examples in Italy of multifunctionality applied to the agricultural sector, which has become capable of producing not only goods but also services.

“In addition to its primary function of producing food and fibre, agriculture can also shape the landscape, protect the environment and land and conserve biodiversity, sustainably manage resources, contribute to the socio-economic survival of rural areas, and ensure food security. When agriculture adds one or more of these functions to its primary role, it can be called multifunctional.”

(OCSE - Organisation for Economic Cooperation and Development – 2001)

Multi-functionality is an opportunity for the agricultural sector that allows farms to expand their offer of goods and services such as landscape conservation, transmission of rural culture and traditions. Many farms, to counteract the low profitability and loss of autonomy in the market, which has an increasingly global and consumerist connotation, diversify their activities by investing in the tourism sector and specifically in sustainable tourism. Through agrotourism, farms contribute to the preservation and protection of natural habitats and ecosystems, to the prudent use of resources, and to the revitalisation of the countryside by

rehabilitating existing buildings and investing in new infrastructure that respects nature and the environment.

As defined by the **European Commission's Directorate-General for Agriculture**: "***multifunctionality** brings together the complementary roles that agriculture plays within society, in addition to its role as food producer", including "the supply of public goods such as food security, sustainable development, environmental protection, the vitality of rural areas and the maintenance of a general balance within society between farmers' incomes and the incomes of people in other occupations".* The multifunctionality of agriculture can be defined as the 'capacity of the primary sector to produce secondary goods and services of various kinds, jointly and to some extent inevitably linked to the production of products for human and animal consumption' (National Institute for Agricultural Economics, 2004).

As early as 1998, the EU-funded IMPACT study highlighted the diversification process taking place within European companies. The study highlighted how European agriculture was implementing development strategies along three alternative and interconnected paths, leading enterprises to assume an increasingly multifunctional character.

In fact, the farm can activate multifunctional practices by following different paths described below and summarised in Figure 1 (Ploeg, 2002):

- **Deepening** (deepening, intensification) is the practice whereby the farm enhances and differentiates its production potential by orienting it towards agricultural goods with different characteristics from conventional ones, such as **organic agriculture**, typical, designation of origin and geographical indication products, or by moving along the supply chain, approaching the final consumer, with direct sales;
- **broadening** (enlargement, expansion) refers to the practice whereby the range of income-generating activities is broadened, some of which may even be independent of agricultural production proper; business activity is expanded to a rural context that is no longer strictly agricultural, such as **agrotourism, landscape management, biodiversity conservation**;
- **Regrounding** refers to multi-activities that can be carried out on farms, but not strictly 'agricultural', e.g., craft workshops or the organisation of festivals and ceremonies. This type of activity also developed widely in Italy in the 1980s and 1990s and represents a structural and vital phenomenon, the result of an active strategy of adaptation of the primary sector to the more general dynamics of the socio-economic system.

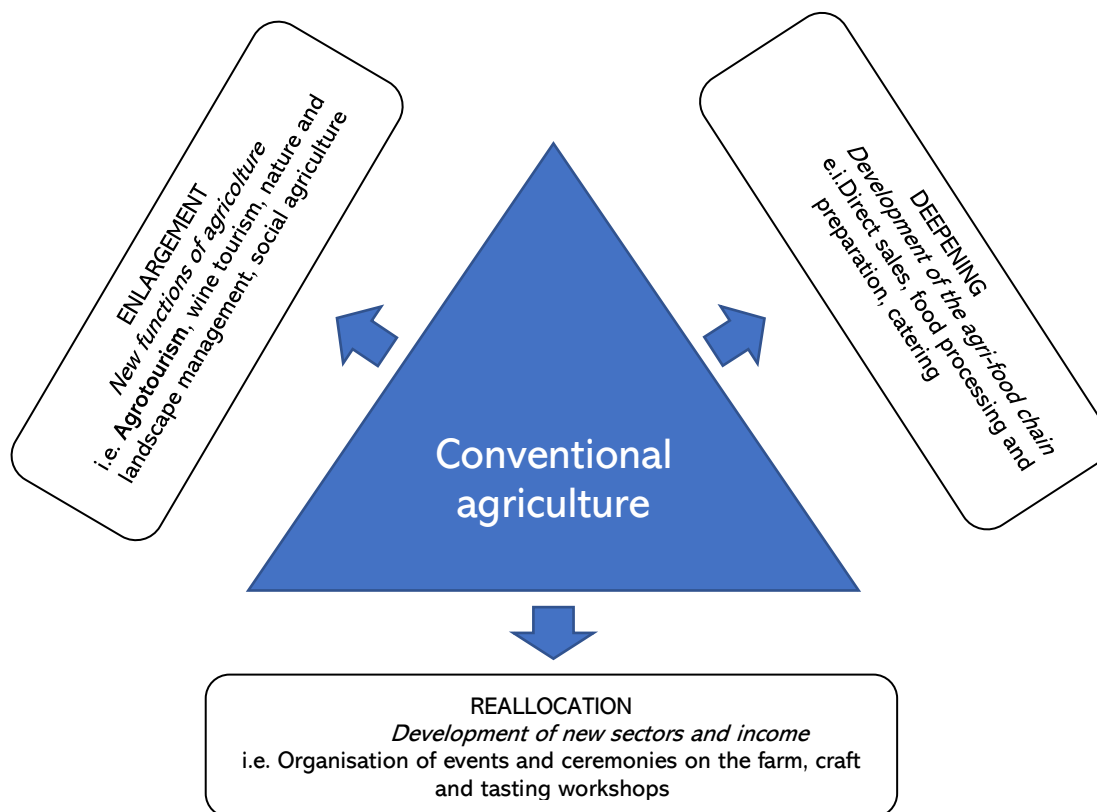


Figure 1- The development triangle of multifunctionality in modern agriculture proposed by the IMPACT study. Agrotourism is a key for the expansion of activities and value creation in the new agricultural reality (source: Banks J., Long A., Van der Ploeg J.D., 2002)

Multifunctionality effectively places agriculture, in its renewed sense as a producer not only of traditional (primary) goods, but also of other goods, at the centre of people's interest. Multifunctionality is not an exclusive trait of small businesses nor of marginal agriculture, although it can be strategic in improving the remuneration of small family businesses. **Agrotourism** is one of the economic activities that define multifunctionality in rural areas, together with recreational, cultural, and sporting activities, quality food production, product processing, short supply chain (direct sale of products), educational activities, social activities and personal services, 'green' production (renewable energy, biomass) and land management (forest care, footpaths, care of public green areas).

1.2 Funding and opportunity for the agrotourism sector

The CAP (Common Agricultural Policy) and its related European Fund for Rural Development (EAFRD) continue to be an important tool for the growth of agricultural enterprises. Over the years, it has gone through different phases and the instruments linked to the first pillar (direct aid and market measures) and the second pillar (rural development programmes or RDPs) have guided business development.

In particular, the distribution of the EAFRD in rural areas is based on six priorities. When establishing their Rural Development Programmes (RDPs), EU Member States and regions must address at least four of these priorities.

These broad priorities of rural development policy are divided into specific areas of intervention, known as 'Specific Aspects' (Focus Areas or FA). The RDPs, of which there were 21 at the Italian level for the 2014-2020 CAP, quantify the objectives with respect to the selected specific aspects and define the Programme Measures and their allocations to achieve the objectives set.

Measures are thus the instrument with which specific focus areas are activated that refer to the more general priorities. In turn, measures are divided into a set of sub-measures; however, each sub-measure can be allocated simultaneously to several focus areas related to one priority or to focus areas of different priorities.

Table 1- Priorities and focus areas within rural development plans. Priorities and focus areas are established at EU level and are therefore common within European states

PRIORITY 1 Promoting knowledge transfer and innovation in agriculture, forestry and rural areas	
FOCUS AREA 1	1A Stimulating innovation and the knowledge base in rural areas
	1B Strengthening the links between agriculture and forestry on the one hand and research and innovation on the other
	1C Encouraging lifelong learning and vocational training in agriculture and forestry
PRIORITY 2 Competitiveness and profitability in the agricultural sector	
FOCUS AREA 2	2A Encouraging the restructuring of farms with structural problems and diversification
	2B Promoting generational change in agriculture
PRIORITY 3 Promotion of the agri-food chain and risk management	
FOCUS AREA 3	3A Improve supply chain integration by promoting the quality of local markets, short supply chains, producer associations and inter-professional organisations
	3B Supporting corporate risk management
PRIORITY 4 Protection and restoration of natural ecosystems	
FOCUS AREA 4	4A Protecting biodiversity
	4B Water resource management
	4C Soil management
PRIORITY 5 Combating climate change	
	5B Efficient use of energy resources
	5C Promoting the supply and use of renewable energies, by-products, waste and residues, etc..
	5D Reducing methane and nitrous oxide emissions
	5E Promoting carbon sequestration in agriculture and forestry.
PRIORITY' 6 Promoting social inclusion, poverty reduction and the economic development of rural areas	
FOCUS AREA 6	6A Diversification of agricultural activities, creation of small businesses and employment
	6B Promoting local development actions
	6C Promoting the accessibility, use and quality of information and communication technologies

Table 1 provides a summary of the priorities and their focus areas, while Figure 2 shows a schematic breakdown of the RDPs with the relationship between: priorities, focus areas and measures.

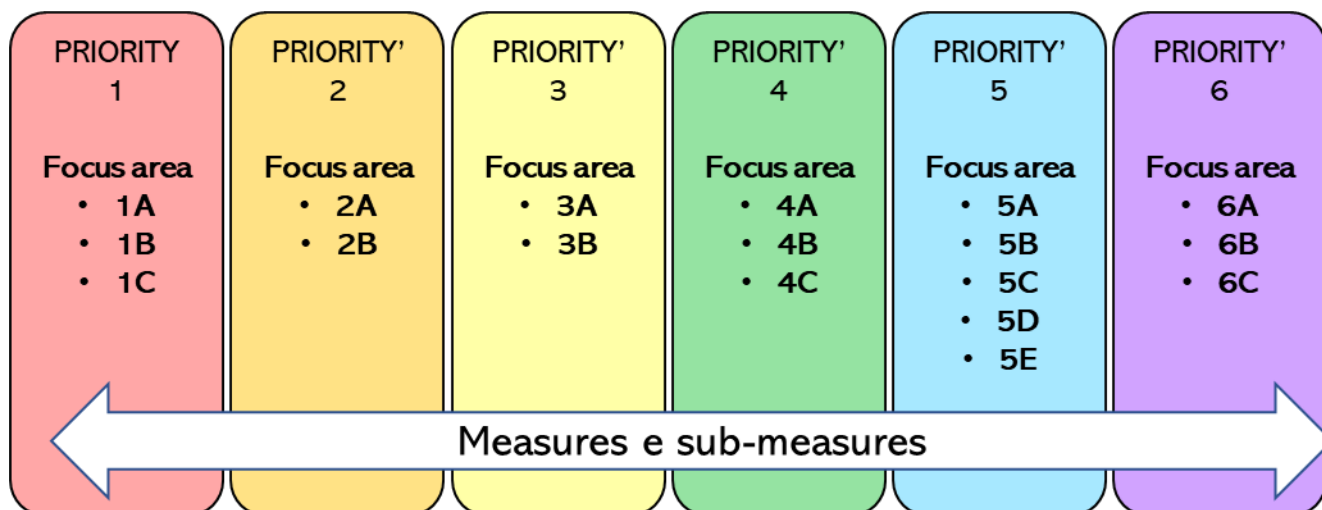


Figure 2- The articulation of RDPs at regional level. The distinction makes it possible to understand schematically how different measures can contribute to several focus areas and thus general development priorities.

The purpose of this brief introduction is to explain how funds have been made available at Italian level for the development of agrotourism activities.

Given its peculiarities, Italian agriculture has been strongly interested in the multifunctional activity development processes described in the previous paragraph, first and foremost the development of agrotourism activities.

In fact, among the agricultural sectors in Europe, the Italian one has a steady growth in the orientation towards diversification of income sources through services and related non-agricultural activities. In 2019, the value of services and related activities reached **22%** of the value of **total agricultural production** (Nazionale-Ismea, 2023). This result occurred and was also possible thanks to the implementation of the regional RDPs in the 2014-2020 programming period through the activation of specific measures to support **diversification** and **multifunctionality**:

- **Sub-measure 6.2-** Business start-up aid for non-agricultural activities in rural areas.
- **Sub-measure 6.4-** Support for investments in the creation and development of non-agricultural activities.

These measures have been the sources of direct funding for the start-up or development of agrotourism activities, to allow funding for general diversification of activities.

Measures 6.4 and 6.2 in fact finance, albeit with different specifications, investments for farm diversification activities in order to foster sustainable development in rural areas and directly increase farm household income (NRN-Ismea, 2020).

Example of a sub-measure 6.4 call for proposals Tuscany Region

€ **Types of investment allowed**

- Investment to improve the quality level of rural agrotourism hospitality activities including the preparation and serving of farm produce to guests, investment in farm open spaces to enable agrotourism hospitality and also investment aimed at energy and water efficiency;
- Investment for interventions aimed at the development of educational/educational activities and social and service activities;
- Investment for leisure, recreational activities related to animal sports and linked to rural traditions.

€ **Type of aid:** Incentives were implemented either as **capital grants** or by means of **subsidised loans** and with different percentages according to the regions.

€ **Beneficiaries:** Access to funding has always been limited to farmers or agricultural companies registered in the business register.

In 2020 the total budget allocated by Italian Regions to **sub-measures 6.4 and 6.2** was **€624 million, 3.4%** of the entire RDP budget (RRN-Ismea, 2020).

To activate the two measures, almost all the Regions used **Focus Area 2A** (Encouraging the restructuring of farms with structural problems and diversification), **FA 6A** (Diversification of agricultural activities, creation of small businesses and employment), **FA 2B** (Encouraging generational turnover in agriculture) and **FA 5C** (Efficient use of energy resources) (Figure 3).

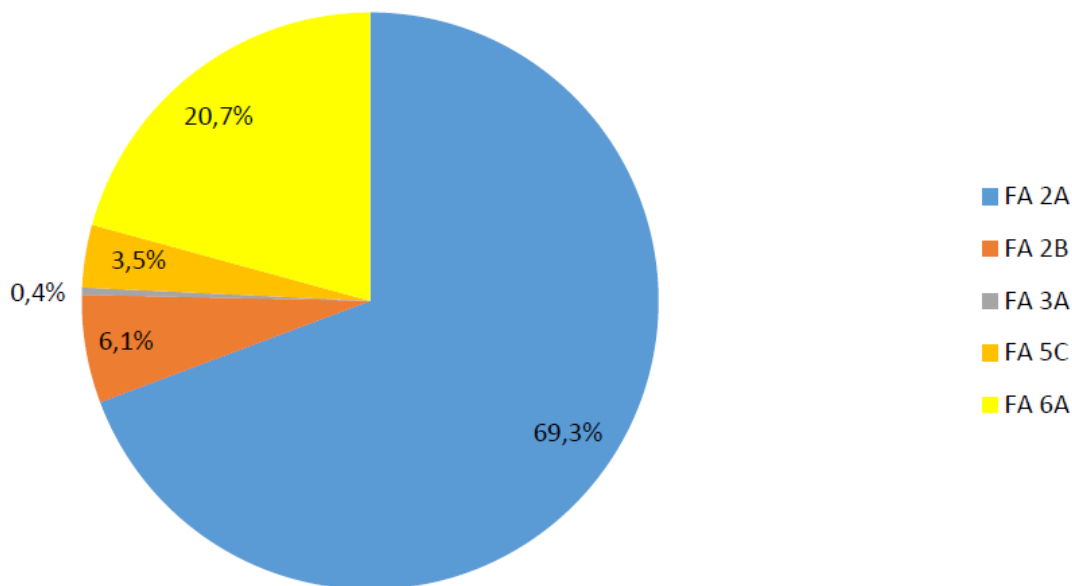


Figure 3- Distribution by Focus Area of the planned budget for sub-measures 6.4 and 6.2 year 2020 (NRN-Ismea, 2020)

From the beginning of the programming period until the end of 2020, 114 calls related to sub-measure **6.4 (96 calls)** and **6.2 (16 calls)** were issued.

As many as 69 calls activated within FA 2A and 2B, issued on sub-measure 6.4, were related to support for farm diversification in the strict sense. Those aimed at the activation of renewable energy were 18, and 11 those aimed at the activation/creation of non-agricultural activities within rural areas as direct support to AF 6A.

The majority of the Regions activated sub-measures 6.4 and 6.2 through **Complex Projects**, i.e. through an organic set of interventions (Packages) referable to more than one RDP measure, also located in different Focus Areas, with the aim of launching activities with a high economic planning depth (PIF, PIT, Integrated Area Projects) (RRN-Ismea, 2020).

As we will describe later, the Region of Tuscany, which is the region at national level with the highest number of agrotourisms, has activated 10 calls on Measure 6.4, of which 6 in support of diversification (FA 2A and 2B) and 4 in support of renewable energies (FA 5C).

Table 2- "Creation and development of farm diversification" financial statement of RDP calls for proposals for the Tuscany Region (thousands of euros)

Regione	Measure	Description of the measure	Deadline	Number of beneficiaries	Budget allocated
TOSCANA	6.4	Financing on farm diversification activity	15/01/2016	234	€ 28.271 mil.
			01/04/2016	39	
			20/07/2017	18	
			19/12/2017	82	
			14/02/2019	38	
			06/07/2020	105	
Total beneficiaries				516	

Source: Ismea - NRN processing on PSR 2014-20 data as at 31 December 2020

In order to support their production and agro-tourism activities, Italian agricultural entrepreneurs can also count on financing programmes through the implementation of the PNRR by the State. The **PNRR** (National Recovery and Resilience Plan) in **6 Missions**, i.e. main thematic areas on which to intervene, identified in full coherence with the 6 pillars of the Next Generation EU. The Missions are divided into **Components**, areas of intervention that address specific challenges, composed in turn of **Investments** and **Reforms** (Italy, 2021).

❖ PNRR Mission 1 '**Digitisation, Innovation, Competitiveness, Culture and Tourism**' with the measure Transition 4.0 aims at supporting the digital transformation of enterprises, by incentivising private investments in activities that support digitisation such as the acquisition of tangible capital goods 4.0 Agro-tourism activities have been included among the activities that can draw on subsidies to **support** investments for energy efficiency, environmental sustainability and digital innovation through the Revolving Enterprise Fund (FRI-Tur).

Through long-term co-financing (up to 15 years): property renovation, innovative environmental investments, noise pollution management, and other areas aimed at strengthening the competitiveness of businesses in the sector, the achievement of new quality standards recognised at European and international levels, also developed in terms of environmental sustainability and health safety.

However, the objective is to support medium-large investments (between EUR 500 thousand and EUR 10 million), so it is unlikely that agro-tourism businesses will be able to access the fund.

❖ The PNRR's **Mission 2 'Green Revolution and Ecological Transition'** aims to support a profound change to achieve the country's green, ecological and inclusive transition, favouring the circular economy, the development of renewable energy sources and more sustainable agriculture. The Agrisolar Park measure is aimed at supporting investments in production facilities in the agricultural, livestock and agro-industrial sectors in order to remove and dispose of existing roofs

and build new insulated roofs, create automated ventilation and/or cooling systems, and install solar panels and intelligent flow and storage management systems. The resources are earmarked for interventions in the primary agricultural production sector, in the agricultural product processing sector for the construction of photovoltaic systems to be installed on buildings for productive use in the agricultural, livestock and agro-industrial sectors.

In conclusion, despite the fact that agrotourism represents a relevant activity within the national agricultural landscape, no specific funds have been allocated for the implementation of hospitality activities, but overall funding has been provided for the diversification of agricultural activities. This is further proof that agrotourism represents an element linked to the agricultural context and that it is configured as a tool for the economic enhancement of farms and, more generally, of the territory.

Let us, therefore, take a brief look at the role of agrotourism in the development of territories, especially the more rural ones.

2. Legislation and regulation

2.1 What is an agrotourism activity according to the legislation?

Agrotourism is a form of tourism in the countryside that can only be carried out on farms by farmers. Italy has currently adopted a framework law regulating agrotourism, **National Law No. 96 of 20 February 2006**.

The law establishes some fundamental principles for the sector in particular:

❖ **Defines and describes agrotourism activities:**

"Agrotourism activities are understood to be the reception and hospitality activities carried out by agricultural entrepreneurs [...] through the use of their farm in connection with the activities of cultivation of the land, forestry and animal breeding."

Agrotourism activities include:

- (a) providing accommodation in lodgings or open spaces intended for camping;*
- b) providing meals and beverages consisting mainly of their own products and products from farms in the area, including alcoholic and super-alcoholic products, with preference given to typical products bearing the PDO, PGI, IGT, DOC and DOCG marks or included in the national list of traditional agri-food products, in accordance with the procedures set out in Article 4, paragraph 4*
- c) organise tastings of farm produce, including wine-tasting, to which Law No. 268 of 27 July 1999 applies*
- d) organise recreational, cultural, educational, sporting, hiking and horse-riding activities, also outside the land at the farm's disposal, also by means of agreements with local authorities, aimed at enhancing the territory and rural heritage*

❖ **Introduces the type of premises that may be used and the limits of agrotourism activities**

- a) "Buildings or parts of buildings already existing on the land may be used for agrotourism activities."*
- (b) "The organisation of agrotourism activity is permitted as long as it is not so large that it loses its connection requirements with agricultural activity."*

The definition of building requirements and criteria for assessing the connection between agrotourism and agricultural activity are elements on which the framework law does not intervene, but it is left up to the Italian regions to define these and other aspects related to agrotourism.

❖ **Provides for the establishment of a national agrotourism observatory**

The observatory's purpose is to promote the exchange of experiences on the national territory on the state of agrotourism and to supplement this with data on the sector's size in order to edit a report on the state of agrotourism. Every year a study is produced that monitors the sector's performance and photographs the situation with figures and data.

All reports are available here:

<https://www.reterurale.it/flex/cm/pages/ServeBLOB.php/L/IT/IDPagina/3507> (resource in Italian)

In regulating the agrotourism sector in Italy, ample space has been devoted to local autonomy, leaving it to the Regions and Autonomous Provinces to define and characterise local agrotourism activities through the issuance of specific legislative measures.

Generally speaking, **regional laws** establish **criteria** and **limits** for the performance of the various agrotourism services, generally providing for a maximum number of **beds**, **pitches**, meals or table places for accommodation, camping (so-called agricamping) and **catering**.

They also establish the administrative procedure that regularises the performance of agrotourism activities, which, albeit with differences between one region and another, generally provides for:

- a first phase of ascertaining the requirements of connection and complementarity, with respect to agricultural activity, of the agrotourism activities to be carried out
- a second stage of declaration to the municipality of the start of the activity, accompanied by the health opinion from the local authorities.

The complex regulatory structure of the Italian agrotourism sector is shown in table 3. The various laws issued at regional level have undergone modifications and additions following changes in economic scenarios, the introduction of new activities (e.g. glamping) and different needs. The table therefore shows the complex system regulating the sector. A brief summary of the main aspects will then be proposed in the following paragraphs.

Table 3- Regulatory framework of the Italian agrotourism sector (Source: RRN data, 2021)

Region	References to the law	Title	Amendments
Abruzzo	R.L. 31 July 2012, n.38	Regulation of agrotourism activities in Abruzzo	
	R.L. 12 August 2020, n.28	regulation of wine tourism activities in Abruzzo	
Basilicata	R.L. 25 February 2005, n.17	Agrotourism and rural tourism in Basilicata	
Calabria	R.L. 20 April 2009, n.14	New regulations for the exercise of agrotourism, educational and social activities on farms	R.L. 5 July 2016, n.22
Campania	R.L. 6 November 2008, n.15 and next amendments	Regulations for agrotourism activities	R.L. 21 January 2010, n.2 R.L.27 January 2012, n.1 R.L. 8 August 2016, n.22
Emilia-Romagna	R.L. 31 March 2009, n.4	Regulation of agrotourism and the multifunctionality of farms	R.L. 26 July 2013, n.14 R.L. 21 December 2017, n.24



Friuli-Venezia Giulia	R.L. July 1996, n.25 and next amendments	Regulation of agrotourism	R.L. 9 November 1998, n.13 R.L. 22 February 2000, n.2 R.L. 15 May 2002, n.13 R.L.24 March 2004, n.8 R.L. 4 June 2004, n.18 R.L. 18 August 2005, n.21 R.L. 25 August 2006, n.17 R.L. 27 November 2006, n.24 R.L. 20 August 2007, n.22 R.L. 17 October 2007, n.25 R.L. 21 December 2012, n.26 R.L. 26 June 2014, n.11 R.L. 30 December 2014, n.27 R.L. 25 September 2015, n.22 R.L. 11 August 2016, n.14 R.L. 21 July 2017, n.28
Lazio	R.L. 2 November 2006, n.14 and next amendments	Rules on diversification of agricultural activities	R.L. 10 august 2016, n. 12 R.L. 22 October 2018, n.7 (art.16) R.L. 31 December 2016, n.17 R.L. 14 August 2017, n. 9
Liguria	R.L. 21 November 2007, n.37	Regulation of agrotourism activity of fishing tourism and ichthyic tourism	R.L. 7 august 2014, n.22
Lombardia	R.L. 5 December 2008, n.31 e next amendments	Consolidated text of regional laws on agriculture - Title X - Regional regulation of agrotourism	R.L. 18 June 2019, n.11 R.L. 18 October 2019, n.11 (art.1, comma1, d)

Marche	R.L. 14 November 2011, n.21	Regional provisions on farm multifunctionality and diversification in agriculture	R.L. 27 November 2012, n.37 R.L. 23 December 2013, n.49 R.L. 4 December 2014, n.33 R.L. 2 December 2016, n. 27
Molise	R.L. 22 March 2010, n. 9 and next amendments	Regulation of agrotourism activities	R.L. 9 April 2010, n. 12
Piemonte	E.L. 22 January 2019, n.1	Reorganisation of agricultural and rural development regulations	Title III - multifunctionality
Autonomous province of Bolzano	P.L. 19 September 2008, n.7	Regulation of agrotourism	
Autonomous province of Trento	P.L. 19 December 2001, n.10 and next amendments	Regulation of social agriculture, wine routes, flavour routes, flower routes, fishing tourism and fish tourism	P.L. 2 May 2012, n.8 P.L. 21 January 2015, n.1 P.L. 23 May 2016, n. 9 P.L. 21 July 2016, n.12
	P.L. 30 October 2019, n.10	regulation of agrotourism and amendments to the provincial law on agrotourism 2001 and the provincial law on incentives for enterprises 1999	P.L. 23 December 2019, n. 12 (art.18) P.L. 13 May 2020, n.3 (art.46) P.L. 6 August 2020, n. 6 (art.46)
Puglia	R.L. 13 December 2013, n. 42	Regulation of agrotourism	R.L. 10 August 2018, n. 44 R.L. 28 December 2018, n.67
Sardegna	R.L. 11 May 2015, n. 11	Regulations on agrotourism, fishing tourism, educational and social farms and	R.L. 2 August 2016, n. 19 R.L. 11 January 2019, n.1 (art.2) R.L. 10 June 2020, n.15

		repeal of regional law no. 18 of 1998	
Sicilia	R.L. 26 February 2010, n. 3 and next amendments	Regulation of agrotourism in Sicily	R.L. 12 May 2010, n. 11 R.L. 11 May 2011, n. 7
Toscana	R.L. 23 June 2003, n. 30 and next amendments	regulation of agrotourism activities in Tuscany	R.L. 28 May 2004, n. 27 R.L. 3 January 2005, n. 1 R.L. 28 December 2009, n. 80 R.L. 3 December 2012, n. 69 R.L. 21 January 2014, n. 4 R.L. 23 February 2016, n. 14 R.L. 11 December 2019, n.76 (regulation of wine tourism activities) R.L. 6 August 2020, n.80
Umbria	R.L. 9 April 2015, n.12	Consolidated text on agriculture - Title VIII Agrotourism, educational farms, social farming and social farms	
Valle d'Aosta	R.L. 4 December 2006, n.29	New regulations on agrotourism. Repeal of Regional Law No 27 of 24 July 1995 and Regional Regulation No 1 of 14 April 1998	R.L. 22 December 2017, n. 23
Veneto	R.L. 10 August 2012, n. 28 and next amendments	Regulation of agrotourism, fish tourism and fishing tourism	R.L. 24 December 2013, n. 35 R.L. 23 February 2016, n. 7 R.L. 29 December 2017, n. 45

In 2013, with the Ministerial Decree of 13 February 2013, Italy established the sector label, **Agriturismo Italia**, for companies that operate regularly according to current regulations (Figure 4).



Figure 4- The mark, which distinguishes companies operating legally and in accordance with regulations, is represented by a sunflower ideally enclosing a farm.

The classification, which applies to agrotourism farms that offer hospitality (accommodation and agri-camping), is intended to give the public an overall idea of the level of comfort (cosiness of the welcome), the variety of services (animation of the welcome) and the quality of the environmental context (nature, landscape, tranquillity) that each farm is able to offer.

To implement this system, the Ministry of Agriculture, in collaboration with the regional administrations and national agrotourism associations, identified **five categories**, with the aim of giving the public a rough idea of the level of comfort, variety of services and quality of the environmental context of each farm.

The requirements and relative scores are proposed for the entire national territory, although regional administrations may adapt the national requirements to the local agrotourism reality in consideration of the characteristics of the agricultural structures used for production and

hospitality, the size of the enterprises and cultivation orientation, the characteristics of the landscape, or local customs and traditions.

While respecting the different regional specificities, the national classification system thus offers a guarantee of uniformity in the level of quality of the various agrotourism structures in the territory.

Each farm with hospitality can be identified with a **category**, from **1 to 5 sunflowers**, represented by a special symbol (Tab. 4).

This system is intended to harmoniously represent the spirit and 'personality' of Italian agrotourism in its various forms, enhancing the agricultural characterisation of the hosting context, which represents one of the most significant 'expectations' of those who choose agrotourism for their holidays, while also considering aspects related to the landscape-environmental context in which agrotourism activities take place.

In 2014, the procedures for the application of the national label were issued and the national agrotourism directory was established, integrating all the regional lists. The institutional portal of agrotourism www.agriturismoitalia.gov.it contains all the information related to the national directory.

Table 4- The Italian agrotourism brand classification system and its categories

 MARCHIO NAZIONALE AGRITURISMO		 MARCHIO NAZIONALE AGRITURISMO (CON MODULO GRAFICO CLASSIFICA)	
		<ul style="list-style-type: none"> ▪ Category 1 symbol <p>Business that offers only the minimum equipment and services required by law in conditions of necessary hygiene and functionality</p>	
		<ul style="list-style-type: none"> ▪ Category 2 symbol <p>A company that offers, in a simple form, equipment and services beyond the minimum required by law in an organisational and landscape-environmental context with sporadic departures from normality.</p>	
		<ul style="list-style-type: none"> ▪ Category 3 symbols <p>"Average" farm that offers, with some organisational refinements or structural qualities, equipment and services that also highlight the agricultural and naturalistic characterization of the reception, in a landscape-environmental context of good quality.</p>	
		<ul style="list-style-type: none"> ▪ Category 4 symbol <p>A farm that harmoniously takes care of the comfort and agricultural and naturalistic characterization of the reception, providing the guest with a high level of equipment and services in an excellent landscape-environmental context.</p>	

2.2 What are the requirements for agrotourism?

National Law No. **96 of 20 February 2006** in its 16 articles sets out the requirements for agrotourism in all its aspects.

- **Article 1** outlines the aims of agrotourism: protection, qualification and valorisation of the specific resources of each territory; to encourage the maintenance of human activity in rural territories; to encourage multifunctionality in agriculture and income differentiation; to encourage initiatives in defence of the soil, the territory and the environment by farmers with the aim of increasing incomes and raising the quality of life; to recover the rural building heritage; to support and encourage typical, quality production and food and wine peculiarities; to promote rural culture and food education; to foster agricultural and forestry development.
- **Article 2** defines agrotourism as reception and hospitality activities, exercised by individual or associated farmers and their family members, through the use of their own farm, in a relationship of connection and complementarity with the activities of cultivation of the land, forestry, and livestock breeding, which must in any case remain prevalent.

The essence of agrotourism is already encapsulated in the first **two articles**, and the fundamental role of the agricultural entrepreneur in protecting and enhancing the land, at the same time its custodian and improver, is clear.

Agrotourism is **inseparable** from agricultural enterprise; without agricultural activity, agrotourism does not exist.

The purpose of the law is to support the permanence of farmers in rural areas, promoting the valorisation of typical local products and the cultural and architectural traditions of the rural world. Whoever intends to carry out this type of activity must be an agricultural entrepreneur; have a working farm and be registered in the list of agrotourism operators. In addition to the farmer, his or her family members, and fixed-term, open-ended and part-time employees may also be employed in agrotourism.

One of the characteristics of agrotourism is the vocation to transmit and preserve the cultural traditions of the territory through a system of family hospitality, offered in the entrepreneur's home, and typical catering based on local food and wine.

- **Article 3** gives general indications on the type of premises that can be used for agrotourism activities, and leaves it to the regions to regulate the renovation of existing buildings.

A necessary condition for the agrotourism activity to be classified as an agricultural activity is that in the use of the farm for agrotourism purposes the relationship of **complementarity** is respected with respect to the cultivation of the land, forestry and livestock breeding activities, which must remain prevalent. In the context of the general principle of complementarity, **Article 4** of the National Law refers to the regions the task of establishing the criteria, limits and administrative obligations for carrying out agrotourism activities, with the intention of adapting the rules to the country's many rural and socioeconomic contexts.

The Regions regulate the recovery of existing buildings used for agrotourism, and establish criteria, limits and administrative obligations for carrying out agrotourism activities.

Article 2 of the National Law specifies the activities that can be carried out in agrotourism: providing accommodation in lodgings or open spaces intended for campers, serving meals and beverages consisting mainly of their own products and products from local farms, including alcoholic products, giving preference to typical products and characterised by DOP, IGP, IGT, DOCG or included in the national list of traditional agrifood products.

The choice of foodstuffs, food and beverages, to be served is subject to the rule that the product used must come **mainly** from farm production and if this is not possible it must be sourced from **local producers** and from artisan-type processes.

The **catering** service offered by the agrotourism establishes a connection with the farm's agricultural activity through the serving of its own fresh or processed products, contributes to promoting agriculture in the surrounding area by supplementing its own products with products from other farms and enhances the value of local artisanal food products based on the processing of local agricultural products.



Figure 5- The role of agritourisms in the rural economy and their functions. Legislation with various facets has sought to promote and enhance the sector's full potential. (National-Ismea, 2023)

These general principles are detailed in the regional regulations that establish the criteria for their application. Agrotourism may organise tastings of farm produce, including wine, organise recreational, cultural, educational and sports activities, hiking and horse-riding activities, also outside the farm property, and enter into agreements with local authorities with the aim of enhancing the territory and rural heritage. Recreational and cultural activities can take place independently from hospitality and the serving of meals and beverages only if they create a connection with the activity and with the farm's agricultural resources or with other activities aimed at the knowledge of the historical environmental and cultural heritage.

Recreational and cultural activities for which this connection is not realised can only take place as supplementary and accessory services reserved for guests staying on the farm who can benefit from them free of charge.

A peculiarity of agrotourism that differentiates it from conventional tourism is the possibility for tourists to actively participate in the various stages of the food production process, allowing them to immerse themselves in rural life (Fig. 5) (National-Ismea, 2023).

Among the limits imposed by regional regulations, there is also one related to the use of farm-sourced products. In fact, the agrotourism activity must have a link with the agricultural one, but the choice of the constraint has been postponed to the individual regions according to the characteristics of their own production.

In an increasingly globalised market, there is a need to combine the enhancement of farm produce with the need to provide a structure capable of responding to tourists' needs.

Table 4, therefore, summarises the minimum and maximum % of farm, regional and extra-regional products allowed by regulations. Some regions such as Tuscany, Sicily and Sardinia have focused entirely on regional supply chains, strongly limiting the use of non-regional products. A choice made also in function of the strong tourist vocation of the regions themselves, which had to reconcile the birth of agrotourism structures with the more consolidated accommodation structures such as hotels and camping.



Table 4- Table summarising the limits of origin of products to be used for agrotourism catering (minimum/maximum %). The table shows a gradation of values according to the figure (values close to 10=red, values close to 100=green)

Regions	Own products (minimum %)	Regional products (%)	Extra-regional products (maximum %)
Valle d'Aosta	50	30	20
Piemonte	25	85	*
Liguria	40	70	30
Lombardia	35	80	20
P.A. Trento	20	70	30
P.A. Bolzano	30	80	20
Friuli Venezia Giulia	55	25	20
Veneto	50	15	15
Emilia-Romagna	35	80	20
Toscana	100		*
Marche	30	20	20
Umbria	30	55	15
Lazio	30	45	25
Abruzzo	55	35	10
Molise	40	50	10
Campania	60	25	15
Puglia	60		40
Basilicata	75		
Calabria	20	50	5
Sicilia	100		*
Sardegna	85		*

* Products from outside the region are not allowed, except for commonly used products to complete dishes

However, there are other aspects that agrotourism legislation regulates, including the number of lodgings, the number of covers, and the pitches available within the facilities.

Depending on the region, different criteria have been used to set limits or ceilings on agrotourism activities. Again, the differences in rural economies have guided legislative choices, from the more restrictive ones of Veneto, Umbria or Apulia, which have set maximum thresholds for the number of beds, to the freer ones of Tuscany, Sicily or Campania where there is no ceiling, but a parameter for determining the number available for each farm.

For the purposes of this report, it is superfluous to analyse all regulations regions in their limits and characteristics. However, Fig. 6 provides a summary picture of certain aspects such as agricamping, the number of covers and the number of beds in the various regulations.

Figure 6- The various regional regulations in Italy regulate agritourism activities in different ways. While this reflects the characteristics of the regional tourism and agricultural sector, it may represent a disadvantage especially for neighbouring territories.

In particular, the characteristics of: agricamping, meals and accommodation are described below (Istat, 2022).



Agricamping

Almost all regions provide for agricamping with the exception of Valle d'Aosta and the Autonomous Province of Bolzano



Meals

Piedmont, P.A. of Bolzano, Veneto, Tuscany and Molise have no limits on the number of meals that can be provided.

Umbria provides 2 table places for each bed

Valle d'Aosta, Friuli-Venezia Giulia, Emilia-Romagna, Latium, Apulia, Calabria and Sardinia establish the limit for the number of meals that can be administered on a daily basis or on the basis of the annual average



Accommodation

The framework law provides that up to 10 beds the agricultural activity is in any case considered prevalent.

-Tuscany, Campania, Sicily and the P.A. Bolzano have not set limits on the number of beds

-fixed number (Veneto, Umbria, Lazio, Abruzzo, Apulia, Calabria)

-linked to the territory (areas more or less suited to agritourism, protected areas, marginal areas, etc.) (Liguria, Emilia-Romagna, Marche)

-linked to the number of adult guests and children (Piedmont)

-linked to the number of meals provided (Valle d'Aosta)

-linked to the number of flats and rooms (P.A. Trento, Friuli-Venezia Giulia, Sardinia)

-linked to the usable agricultural area or working hours (Molise, Basilicata)

Figure 6- The various regional regulations in Italy regulate agritourism activities in different ways. While this reflects the characteristics of the regional tourism and agricultural sector, it may represent a disadvantage especially for neighbouring territories.

In particular, the characteristics of: agricamping, meals and accommodation are described below (Istat, 2022).

2.3 What are the financial and management of an agrotourism activity?

About the multifunctionality of the agricultural enterprise, the tax regulations only partially transpose the principles established by civil law, however, generally adopt specific and facilitating provisions through the introduction of income tax and VAT payment systems on a lump-sum basis. Revenues from agrotourism, educational and social activities are not included in the agrarian income but are subject to a **flat-rate determination** of taxable income equal to **25%** of revenues net of VAT, and the VAT to be paid to the Treasury amounts on a flat-rate basis to 50% of any VAT collected (social and educational activities, where recognised in official public lists, are exempt from VAT) (Tedioli, 2021).

Income from the direct sale of products is included in the agrarian income when the sale concerns unprocessed products or processed products listed in a special decree. In this case, however, it is necessary that each processed product comes predominantly from the processing of its own products and that purchases from other producers are intended to increase or improve a specific product or to complete, within a product type, the farm's offer (Tedioli, 2021).

Let us take an example:

If the farm produces wine, the grapes must be predominantly its own; if the farm produces jam, it can also complete its range by processing a type of fruit that it does not produce, provided that overall the fruit processed is predominantly its own.

In cases where the processing does not fall within those envisaged by the aforementioned decree, even though it concerns predominantly own products, a flat-rate determination of taxable income equal to 15% of revenue net of VAT is applied to the revenue, and the VAT to be paid to the Treasury amounts to a flat rate of 50% of the VAT collected. The applicable VAT rate varies for different services:

For example, the reduced VAT rate of 10% applies to accommodation, camping and catering services; for recreational and cultural activities (e.g. horse riding), the ordinary VAT rate (currently 22%) applies. In return for payments received from guests, tax receipts or 'talking' tax receipts are issued (showing the various services rendered with the relevant amounts).

Agrotourism activities are subject, in addition to sector-specific regulations, to

- regulations on tourist services (accommodation, farm camping, catering), such as **health and hygiene, fire prevention, and tourist tax**;
- rules on various recreational and cultural activities (e.g. management and safety of swimming pools);

- general rules concerning any service offered to the public (e.g. **accessibility** for the disabled, **health protection** for non-smokers).

State and regional laws may, however, provide for exceptions or simplifications in the application of these rules, due to the small size of the activity or the particular conditions of carrying out the activity in a rural environment

3. Relevant data regarding agrotourism

3.1 Number of agrotourism

The list of agrotourism companies operating on Italian territory is contained in the National Directory of Agrotourism. The Ministry updates the Directory with the support of ISMEA (Istituto di Servizi per il Mercato Agricolo Alimentare), which collects the data provided by the Regions and Autonomous Provinces of Trento and Bolzano.

The Directory allows continuous monitoring of the national agrotourism offer and identifies the farms qualified for the **Agriturismo Italia** brand (see paragraph 2.1) and those that have adhered to the homogeneous national classification system that includes the sunflower symbol (see paragraph 2.1).

In November 2022 there were **25.390 agrotourisms** in Italy (+**3.3% compared** to 2019) of which more than 1/5 in Tuscany. Overall, 73% of farms are concentrated in 8 regions that together with the Province of Bolzano have more than 1.000 agrotourisms. Of the total, about 80% of agrotourisms offer accommodation, about 50% provide catering and about 50% offer recreational and sports activities. Tuscany, the Autonomous Province of Bolzano and Umbria have the highest number of agrotourisms with accommodation, up to 45% of farms offering accommodation. As far as catering is concerned, the region with the highest number of agrotourisms is Tuscany, together with Lombardy, Piedmont, Emilia-Romagna, Veneto and Latium, which together host more than 50 % of farms with such an offer. The number of farms adopting the '**Agriturismo Italia**' (see Chapter 2.1) brand and adhering to the national classification is growing. In the regions where the classification is active, farms with sunflowers account for about 40 per cent of all operating agrotourism farms (National-Ismea, 2023).

An overall picture of the number of agrotourisms and the type of activity they carry out is provided in Table 5. The table was revised on the basis of the 2022 report (National-Ismea, 2023).

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Some summary data:

- **8 out of 10 agrotourisms** offer overnight accommodation with an average of 14 beds;
- **1 out of 2 agrotourisms** offer restaurant services with an average of 41 places per farm;
- **2 out of 10 agrotourisms** offer tasting activities;
- **1 in 2 agrotourisms** offer leisure, cultural and sporting services.



Table 5- Number of farms in the National Directory in 2022. (National-Ismea, 2023)

Regions	Agrotourism	Accommodation	Catering	Food-tasting	Camping	Other activities	Sunflower classification (vedi par. 2.1)
Valle d'Aosta	60	40	35	23	-	15	39
Piemonte	1.364	940	842	733	64	915	-
Liguria	699	550	339	87	32	260	550
Lombardia	1.728	963	1.097	204	5	319	524
P.A. Bolzano	3.253	2.793	548	242	-	1.047	-
P.A. Trento	496	335	121	168	12	-	-
Friuli Venezia Giulia	703	390	526	11	8	192	139
Veneto	1.570	1.015	757	673	81	441	-
Emilia-Romagna	1.258	821	839	-	73	561	467
Toscana	5.380	4.962	1.880	1.679	165	758	2.249
Marche	1.101	934	463	405	66	535	-
Umbria	1.414	1.312	429	287	46	888	577
Lazio	1.315	942	709	290	80	626	84
Abruzzo	588	440	378	92	64	257	-
Molise	116	96	107	46	11	82	71

Campania	870	589	648	505	58	400	-
Puglia	958	761	618	767	135	610	-
Basilicata	214	165	170	18	26	136	85
Calabria	552	492	443	411	57	363	-
Sicilia	959	692	498	439	150	721	-
Sardegna	792	618	586	106	68	165	149
TOTAL	25.390	19.850	12.033	7.186	1.201	9.291	4.934

With such a widespread presence within the Italian territory, even in the smallest municipalities and most marginal territories, agrotourism contributes to Italy's supremacy in Europe in terms of tourist accommodation in rural areas where, in 2020, there were more than 78.000 structures (28.3% of the European total).

In the previous chapters, attention was focused on the role of agrotourism within rural areas. However, no reference was made to its impact within the agricultural system. In all territories, Italian agriculture has moved strongly towards diversification and multifunctionality, albeit at different speeds and intensities. In northern regions, related activities, including agrotourism, have a greater impact than in southern regions.

In total, for every **50 farms**, there are **2 agrotourisms**.

Regarding the production system, 74% of agrotourism farms are diversified (two or more systems) and only 26% have only one production system. As far as the type of activity is concerned, more than half of the farms claim to have olive growing as their technical-economic orientation, slightly less than half have viticulture, followed by other crop production (Fig. 7).

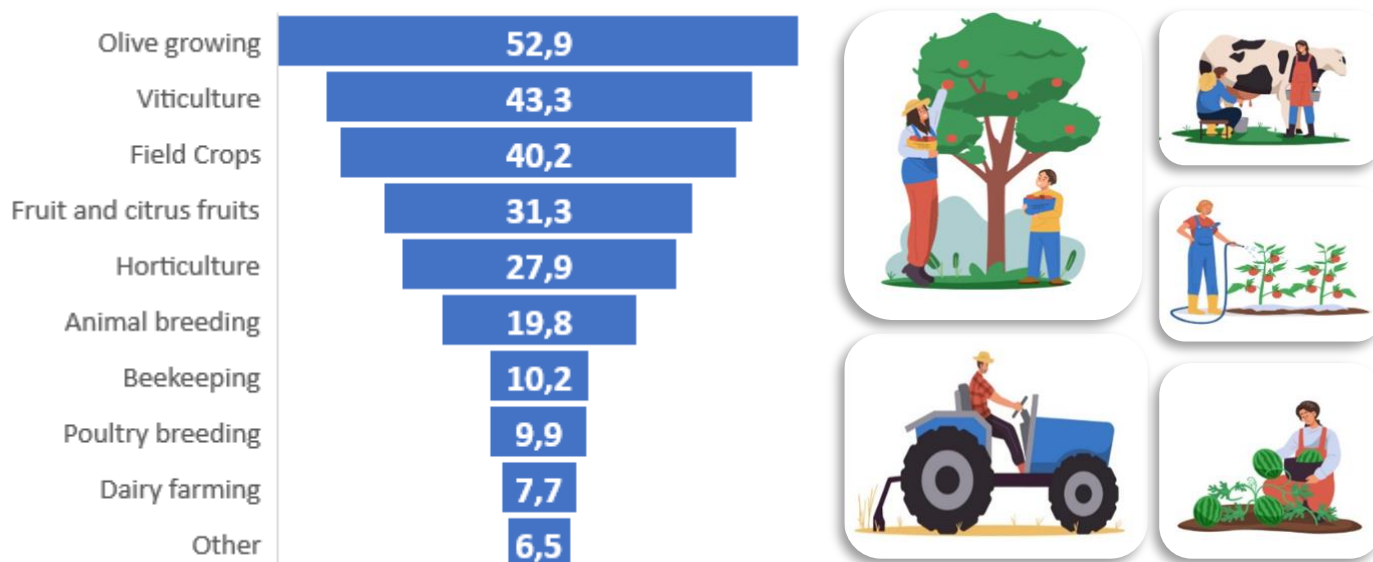


Figure 7 - Technical-economic orientation of farms where agrotourism is present (% values, more than one arrangement possible). (Source: Re-elaboration of RRN-2022 data)

3.2 Demand

In 2020, the year of the pandemic, the entire tourism sector suffered a severe blow, registering major losses in terms of both turnover and presence. Italian agrotourism suffered a drop in turnover from EUR 1.56 billion in 2019 to EUR 802 million in 2020. Italy's more than 25 thousand agrotourism businesses faced a major liquidity crisis with the sudden lack of revenue during the lockdown period coinciding with the start of the season (Istat, 2022).

However, compared to other types of tourism activity, agrotourism was the sector that recorded the smallest losses.

Italian tourism in terms of nights provided in 2020 had a loss of 53% compared to 2019, while the percentage loss of agrotourism for the same period was 34%. The market share of agrotourism in the entire Italian tourism movement in 2020 grew as a consequence of the more substantial collapse recorded by the other tourism sectors and in particular the hotel sector. The overall share of agrotourism guests in 2020 stood at 4 % and that of overnight stays at 4.4 % (respectively 3.2 % and 2.9 % in 2019).

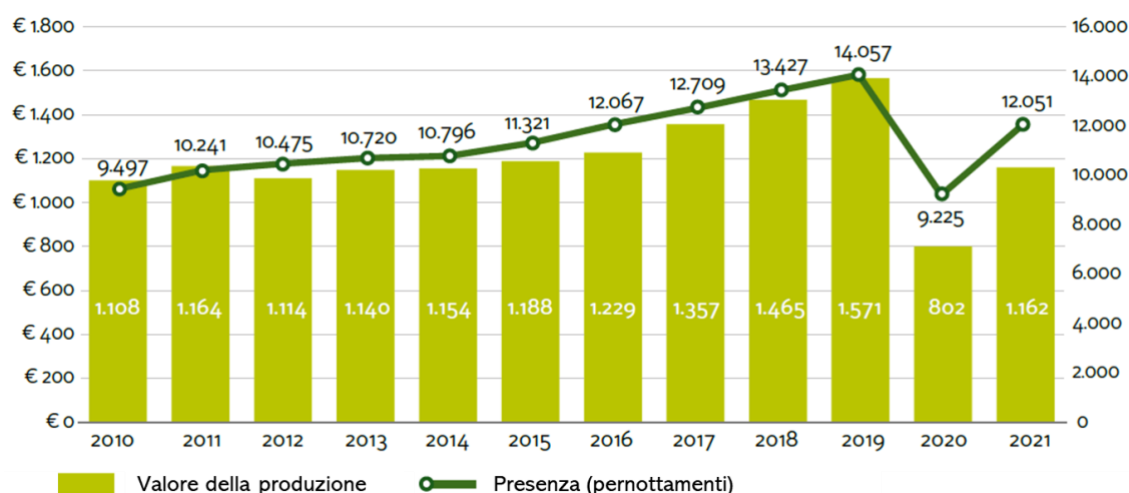


Figure 8 - Development of production value (current values in millions of euro left axis) and farmhouse accommodation (values in thousands right axis) from 2010 to 2021. (Fonte: RRN-2022)

During the period of the pandemic, agrotourism, thanks to a series of favourable structural characteristics, such as its location in the countryside in uncrowded places, its widespread diffusion throughout the territory, the ample availability of outdoor spaces, and the availability of

independent living solutions, responded to the needs of the moment with a very adequate offer. Demand for agrotourism from 2010 to 2019 had a positive trend, growing both in terms of arrivals and presences, especially due to the increasing demand from foreign tourists (Fig. 8).

In 2020 the main foreign market was Germany, which accounts for about half of all foreign demand with 53% of presences, followed by the Netherlands with 9.2% and Switzerland 6.8% (National-Ismea, 2023).

Country for relevance of presence

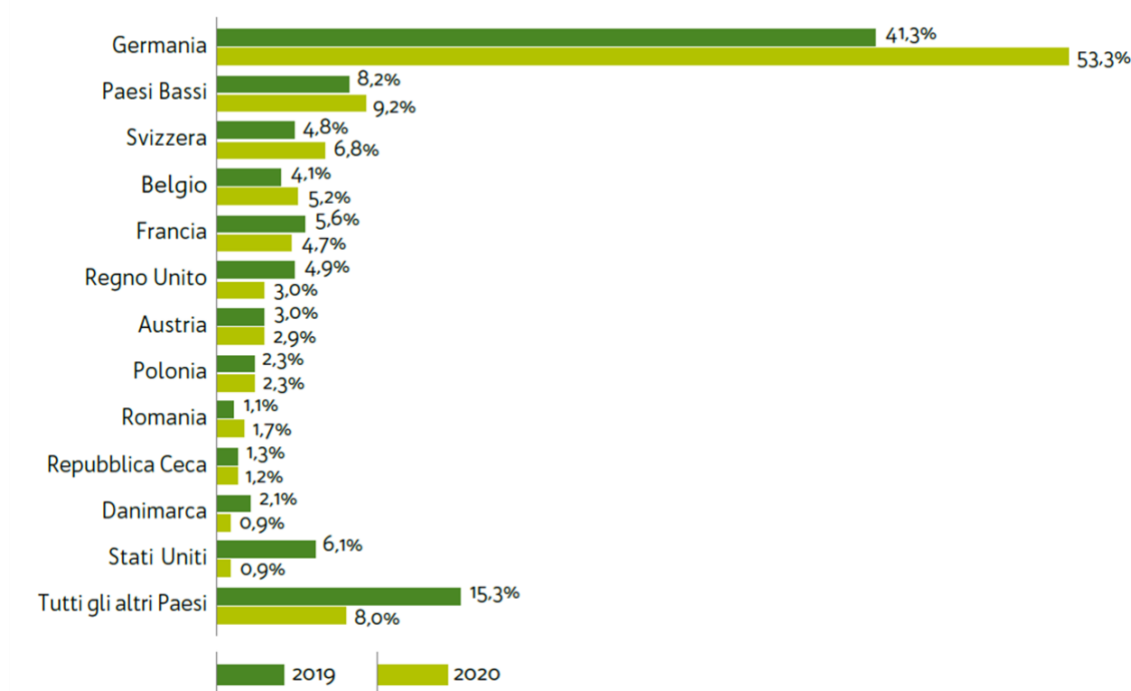


Figure 9 - Share of foreign arrivals by country of origin. (Source: RRN-2022)

Taking into consideration the years 2019 and 2020 across the country, there have been significant drops in stays in agrotourism in almost all Italian regions, with the exception of Molise and Abruzzo, which instead had an increase in reservation. Notwithstanding the above, demand by region remains mainly concentrated in the Centre and North, with Tuscany (27.5 % of presences) and the Province of Bozano (23% of presences) together accounting for 51% of presences.

3.3 Trends and needs of the hosts

The continuation of the health emergency has triggered some changes in the supply of agrotourism and fostered some evolutionary processes in demand that were already underway. A survey conducted in October 2021 by the National Rural Network reveals some new trends for agrotourism tourism:

- ✓ **diversification of services:** in 2021, 75% of businesses activated new farm services and at the same time improved the quality of the farm's offer (search for employees, WI-FI, hygiene protocols, menus, etc.) in order to ensure a greater completeness of the offer and widen the range of experiences that can be enjoyed inside and outside the agrotourism;
- ✓ **typicality of production and food:** the increased interest and demand from tourists for agricultural products that are in season and express the identity of the territories, such as typical and organic products, has directed entrepreneurs to develop direct sales, catering and processing of farm products
- ✓ **home delivery and e-commerce:** the pandemic period influenced the purchasing and consumption styles and habits of many consumers, which favoured the development of home delivery services for farm produce and meals. These services have become stable for many companies. Businesses also increasingly rely on e-commerce as a consequence of the increased use of the Internet and information technology.
- ✓ **smart working** and long-term stays: many agrotourism businesses have organised equipped spaces such as workstations with internet connections, PCs, etc., to meet the demand for spaces where smart working can be practised, which has become widespread. In order to meet customer demand, operators have also studied formulas and promotional initiatives to promote longer stays.
- ✓ **sustainable tourism:** customers' preferences have shifted towards green options and where contact with nature is favoured. There is now the profile of a new customer attentive to environmental sustainability, eco-friendly services, the impact of farming and breeding methods, biodiversity, well-being and relaxation.

Main motivations to choose agritourism according to consumer



Figura 10 – Main reasons for choosing agritourism for their stay according to consumers
(Source: RRN-2022)

As mentioned above, following the pandemic, demand for agrotourism changed in terms of guest attendance and nationality: the attendance of foreign guests decreased and the attendance of Italian guests increased. In the period immediately following the pandemic, the attendance of foreign guests increased again, but thanks to the domestic demand consolidated.

The **guest** has new requirements regarding accommodation and lodgings:

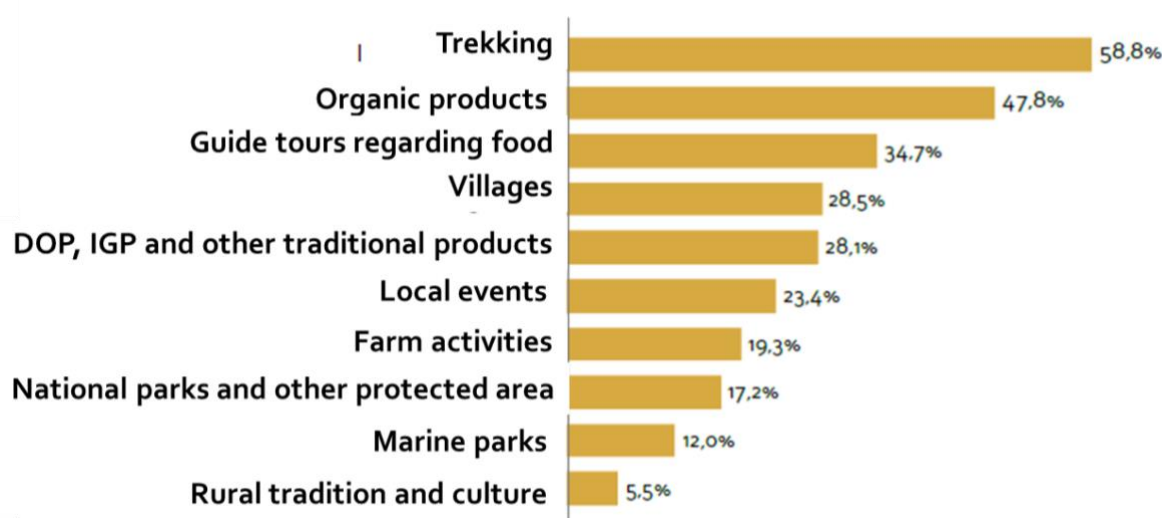
- 50% requires accommodation with **greater autonomy** and **outdoor spaces** such as independent rooms with a garden and **equipped kitchen**;
- requires comfort and accessories, in particular the presence of **WI.FI** for **internet use**;
- pays attention to the **origin** of the agricultural products on sale and used for the packaging of the meals administered;
- requires **differentiated waste** collection;
- the use of **renewable energy sources**;
- the use of **detergents** and **packaging** eco-friendly;
- the presence of **electric charging stations** for vehicles.

Agrotourism offers a holiday in contact with nature that is realised through many activities (Fig. 11): availability of nature trails with structured itineraries, sometimes in protected areas and

nature reserves, educational activities focused on knowledge of crops, livestock and agricultural products (typical products, PDO, BIO). Guided visits to wineries, dairies and processing workshops

are in increasing demand. Interest in activities aimed at rediscovering traditional and rural culture is also on the rise.

Figure 11 – Main areas of interest for farmhouse guests (Source: RRN-2022)



3.4 Digitalization of agrotourism sector

Approximately 70 % of citizens in Italy use the Internet regularly, and during the pandemic period, higher-quality access technologies became widespread.

In Italy, however, still one-third of households do not have a computer and access to the internet at home, women are less digitally inclined than men, the elderly are unfamiliar with technologies and only 11.5 % of Italian businesses make sales via the web. This is what emerges from the PNRR (see Chapter 1.3), which in its drafting reports Eurostat data on the digitisation of Italy (Italy, 2021).

Rural areas are **penalised** compared to urban areas and the South is penalised compared to the North. Only 65% of 16-24 year-olds have basic digital skills or higher. This digital divide can be penalising at all levels, for citizens but also for businesses. Digitalisation has become a priority for Italy and one of the objectives of the PNRR is precisely to support the competitiveness of companies by developing digitalisation and innovation (Italia, 2021).

The digitisation process that is affecting the agricultural sector also concerns agrotourism, as it is closely connected to and inseparable from agricultural activity. From artificial intelligence (AI) to

robotics to the Internet of Things (IoT) and 5G, the latest technologies can offer valuable support for farmers and farms.

The use of digital technologies in agriculture can bring several benefits:

Increased economic and environmental performance: Digitisation can help farmers make better decisions, optimise their operations and increase productivity, leading to higher profits and a more sustainable agricultural sector

- **Environmental sustainability:** The use of digital technologies can help farmers reduce their environmental footprint by optimising resource use, reducing waste and using precision farming techniques
- **Competitiveness of the EU digital supply industry:** Digitisation can help the European agricultural sector to remain competitive in the global market by providing innovative solutions and creating new business opportunities
- **Improved working conditions for farmers:** By automating tasks and optimising operations, digital technologies can help reduce the physical and mental workload of farmers, leading to better working conditions
- **Greater transparency along the supply chain:** digitisation can help improve the traceability and transparency of agricultural products, enabling consumers to make more informed choices. Besides the benefits there are also some challenges that need to be addressed
- **Connectivity problems:** Many rural areas still lack reliable and affordable internet access, hindering the adoption of digital technologies
- **Limited awareness of benefits:** Many farmers may not be aware of the potential benefits of digitisation and may lack the skills and resources needed to implement new technologies.
- **System interoperability:** Different digital platforms may not be compatible with each other, making it difficult to share data and integrate different applications
- **Farmers' skills:** Many farmers may not have the digital skills needed to fully benefit from digitisation
- **Benefit/cost ratio:** The cost of implementing new digital technologies may outweigh the potential benefits, particularly for small farmers.
- **Reluctance to share data:** There may be concerns about data privacy and ownership, hindering data sharing between different actors in the agricultural sector

In addition to these more general aspects, agrotourism requires specific digitalisation in order to fulfil its functions in the best possible way, especially with regard to service delivery and guest

management. Web and social presence is today fundamental and necessary in order to reach an increasingly wide and dislocated public.

Online booking systems are the most widely used and more and more users (66%) make their reservations from the web. In addition, bookings made directly, without using intermediaries (tour operators, agencies, portals) have increased (National-Ismea, 2023). In general, fewer and fewer agrotourism establishments are present with their offer online

4. SWOT Analysis

The short SWOT analysis was carried out involving **40** active **agrotourism** companies in Tuscany. On the subject of agrotourism, the Region of Tuscany is broadly representative of Italian reality in many respects. In fact, Tuscany, besides being the Italian region with the highest number of agrotourism, has geographical characteristics as well as diversified rural contexts that well represent the entire national territory.

The analysis was carried out using the Focus Group method, involving holiday farms in all the provinces operating, therefore, in different environments (coastal maritime area, mountains, inland hills near cities of art, etc.).

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> - Landscape quality and protection of natural resources; - Protection of gastronomic and culinary traditions; - Open environments and presence of green areas; - Relaxed rhythms and lifestyles; - Contact with the surrounding environment; - Contribution to the development of the rural economy; - More informal and familiar hospitality; - Greater sensitivity to the environment. 	<ul style="list-style-type: none"> - Distance from communication routes and cultural centres; - Lack of recreational and sports facilities; - Lack of catering services; - Lack of homogeneity in the provision of facilities and reception services; - Regional regulations; Difficulty in harmonising supply; - Difficulties in adapting facilities to the inclusiveness of guests (accessibility); - Difficulties in accessing connectivity (internet)
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> - Landmarks for rural tourism; - Provide non-agricultural income; - Enhance direct sales and consumer contact; - Encourage green transition and vision adoption; - Environments suitable for all types of families; - Promoting different activities on the farm (e.g. tastings, workshops, courses) 	<ul style="list-style-type: none"> - Increased competition also at international level; - Loss of the link with agricultural activity; - Demand saturation; - Climate change;

The focus group also analysed which activities those involved in the sector perceive as **necessary** for the development of their activities and which aspects they would like to **improve**.

Agrotourism, albeit with some differences, is an established activity throughout the country. **Farmers** who have chosen to also conduct agrotourism activities are continually faced with challenges to keep the level of supply adequate to changes in demand.

When asked to identify which aspects of the agrotourism sector could be improved, almost all the companies involved in the analysis **highlighted** the need to network, to cooperate with other companies of the same type and to work in synergy with promotion bodies and other operators in the tourism sector (Fig. 12). In addition, the difficulty in accessing credit and the scarcity of financial opportunities to meet all those needs to adapt structures and supply, which, as we have seen, are

generated by the changing demand, are considered critical. And again, the aspect of training and bureaucratic simplification is important. Specific training that prepares for the management and running of agrotourism is perceived as an added value to facilitate overcoming those barriers linked to the extensive bureaucracy that today represents a highly critical point for those who want to carry out this activity. The awareness that training and professionalism are necessary to carry out any activity is revealed not only by the need for specific training but also by the need to have access to qualified consultancy services. Lastly, the issue of transport and viability returns: in many cases, facilities due to their location are cut off from certain routes due to a lack of communication links and infrastructure.

Agrotourism operators are aware what are the requirements for their guests: quality of the service offered, place great emphasis on the care of the facilities.

WHICH OF THE FOLLOWING ASPECTS OF THE AGROTOURISM SECTOR WOULD YOU LIKE TO IMPROVE?



Figure 12 – Results of the focus group. To the participants have been asked which main aspects related to the agrotourism sector they would like to improve. Cooperation and financing opportunities are a priority according to the focus group participants.

The maintenance, improvement and expansion of premises and facilities are considered priority activities to guarantee a quality offer that meets the expectations of customers who are increasingly demanding and attentive to certain aspects typical of their stay: sustainability, authenticity, etc. The ability to vary the offer of services according to market demand by introducing new activities and services and modifying existing ones is considered strategic. The promotion and sale of farm products is another strategic factor for operators because in addition to being an element of immediate profit, the sale and diffusion of one's own products has the function of a business card.

The issues of environmental sustainability are at the forefront today, especially in the agricultural and agri-tourism sphere. The possibility of using energy from renewable sources to run one's business is perceived as an added value with the awareness of offering an ethical and sustainable service and having a positive impact on the entire community (Fig. 13).

WHAT ASPECTS OF YOUR BUSINESS WOULD YOU LIKE TO IMPROVE?

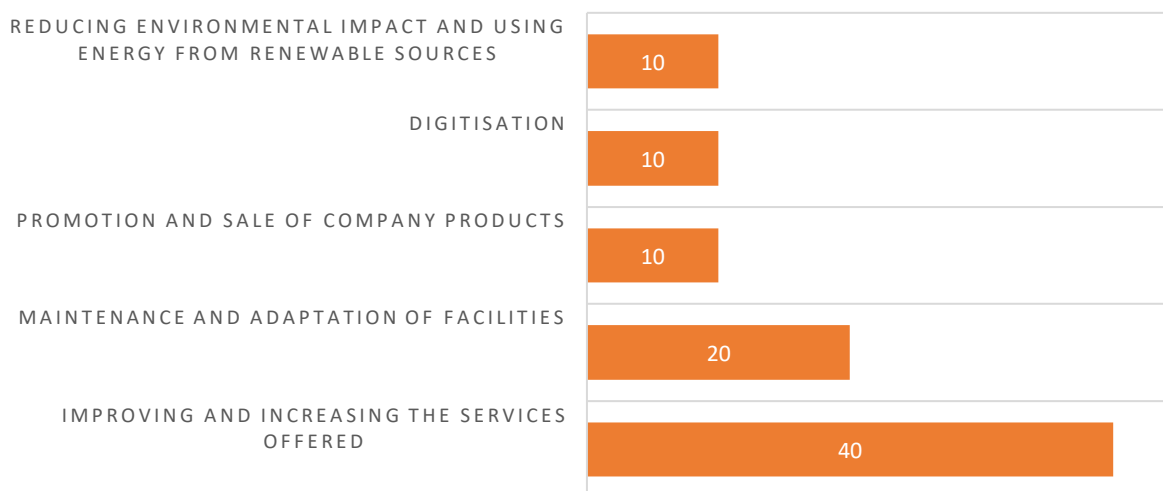


Figure 13 – The figure shows the results regarding which aspects are more relevant to be improved in an agritourism. Diversification has been outlined as the more important aspect.

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Other sources

State legislation database on agrotourism and multifunctionality

www.reterurale.it/agriturismo/normativa

National law and regulations on Italian agrotourism

<https://www.politicheagricole.it/flex/cm/pages/ServeBLOB.php/L/IT/IDPagina/6012>

Background papers on agrotourism

<http://www.agriturismoitalia.gov.it/it/area-download>

Official site of the **Agriturismo Italia**

<http://www.agriturismoitalia.gov.it/it/homepage>

Site of Regional authorities on agrotourism by regions

Valle d'Aosta	https://www.regione.vda.it/agricoltura/multifunzionalita_in_agricoltura/Agriturismo/default_i.aspx
Piemonte	https://www.regione.piemonte.it/web/temi/cultura-turismo-sport/turismo/offerta-ricettiva/agriturismo
Liguria	https://www.regione.liguria.it/articoli/26-servizi-online/1203-agriturismo-e-fattorie-didattiche.html
Lombardia	https://www.agriturismo.regione.lombardia.it/webagri/#/informazioni/GroupB
P.A. Trento	https://www.agriturismotrentino.com/
P.A. Bolzano	https://civis.bz.it/it/servizi/servizio.html?id=1033384
Friuli Venezia Giulia	http://www.ersa.fvg.it/cms/aziende/strutture/agriturismo/
Veneto	https://www.regione.veneto.it/web/agricoltura-e-foreste/agriturismo
Emilia-Romagna	https://agricoltura.regione.emilia-romagna.it/agriturismo-e-multifunzionalita/agriturismo
Toscana	https://blog-agricoltura.regione.toscana.it/argomenti/agriturismo
Marche	https://www.regione.marche.it/Regione-Utile/Agricoltura-Sviluppo-Rurale-e-Pesca/Agriturismo
Umbria	https://www.regione.umbria.it/agricoltura/disciplina-dell-agriturismo
Lazio	https://www.regione.lazio.it/cittadini/agricoltura
Abruzzo	https://www.regione.abruzzo.it/categorie-macroaree/agriturismo
Molise	https://www.regione.molise.it/flex/cm/pages/ServeBLOB.php/L/IT/IDPagina/140
Campania	http://www.agricoltura.regione.campania.it/agriturismo/agriturismo.html



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Puglia	https://filiereagroalimentari.regione.puglia.it/agriturismo
Basilicata	https://www.regione.basilicata.it/giunta/site/giunta/departement.jsp?dep=100049&area=100144&level=1
Calabria	https://www.regione.calabria.it/website/organizzazione/dipartimento8/subsite/agriturismi/
Sicilia	http://pti.regione.sicilia.it/portal/page/portal/PIR_PORTALE/PIR_LaStrutturaRegionale/PIR_Assessoratoregionale delleRisorseAgricoleeAlimentari/PIR_DipAgricoltura/PIR_AreeTematiche/PIR_Attivita/PIR_Agriturismo
Sardegna	https://www.sardegnaagricoltura.it/index.php?xsl=2756&s=14&v=9&c=93237&na=1&n=10

