

AGRITOURISM IN ITALY



Pauline Porcaro

ISS Institute/Italy (Veneto) Fellowship

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Department of Innovation,
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Executive Summary

Agritourism has enjoyed sustained growth in Italy and other parts of Europe since the 1980s. It is a carefully blended mixture of two industries, agriculture and tourism, that offers farming communities, as well as tourists, substantial advantages. These have proven to be socially, environmentally and economically beneficial to both groups.

Agritourism was defined by the Italian Government under national law in 1985 as “...activities of hospitality performed by agricultural entrepreneurs and their family members that must remain connected and complementary to farming activities.” (Sonnino, p. 286) The growth of agritourism, supported financially by government in Australia, is highly recommended in this report.

As highlighted during a recent Tourism Victoria conference, there is a general awareness of a current lack of accommodation and activities for tourists in many areas of rural Victoria. This led the Fellow, Pauline Porcaro, a senior educator in tourism in the Victorian TAFE system, to embrace the opportunity to explore the Italian agritourism system through a Fellowship offered by the ISS Institute and sponsored by Skills Victoria, Victorian Government. Italy has long been regarded as the world leader in agritourism. Three main criteria for its success were of particular interest to the Fellow – broad and innovative product range, sophisticated marketing systems and most importantly, extensive government support.

The Italian system was developed with a clear objective in mind: “*To halt rural out-migration by keeping farmers on the land*” (ibid). With an ongoing economic crisis for farmers in Australia due to climate change, natural disasters and harsh conditions, we need to look at alternative avenues to further support our farmers and keep them on the land. Agritourism development is a proven and reliable source of income for farmers.

The following strategies implemented in the development of Italian agritourism are recommended for consideration by Australia:

- A coordinated financial, planning, and marketing approach to support the development of agritourism by all levels of government and industry.
- The emphasis on farming remaining the primary revenue for the farmer.
- The coordinated marketing approach through branding of agritourism and quality controls.
- The compulsory training of agritourism operators to ensure a skilled sector.

Both our Federal and State Governments have acknowledged an interest in the development of agritourism in Australia. The agritourism brand ‘Gallo Rosso’ or ‘Red Rooster’ which commenced in the Alto Adige region in northern Italy in 1999 presents an excellent model for agritourism development in Australia. The South Tyrol Farmers’ Union commenced the brand with the objective of promoting the region and increasing sales for agritourism operators in the region who were suffering from occupancy problems. Their success has been outstanding with visitor nights to the region growing by a significant 107.4% in just eight years (Knollseisen, Gallo Rosso, personal comment).

The healthy growth in bookings in Alto Adige is testament to the quality control and marketing efforts of the successful Gallo Rosso brand. The range of Italian supply is also noteworthy. With innovative product development ideas such as didactic farms and agricamping facilities that can easily be adapted to the Australian environment.

Executive Summary

Where to from here for Australia? A number of recommendations are included in the report. First, we need to encourage a clear definition of agritourism and outline government policy around funding and standards. Second, it is essential that we build community awareness of agritourism in order to instigate a growth in product and motivate the end users to experience it. In Italy the idea is so ingrained in their culture people speak of taking an 'agritourism holiday'. Third, we need to redefine current applicable farm tourism as agritourism in order to offer internationally recognisable terminology.

It is proposed that a number of agriculture and tourism bodies, both government and industry, be involved in the dissemination of information contained herein specifically to encourage farmers to extend their agriculture businesses to encompass tourism. This should be coupled with the development of specific training programs to enable the farming community to offer tourism excellence in their products and services.

The most important feature of the Italian system, that underpins the successful development of agritourism, is the government funding for farmers to commence these ventures. It is suggested that the Federal Government replace previous initiatives like Farm Help and FarmBis with an 'Agritourism Development Scheme' for farmers. Agritourism should be considered urgently in the interests of sustainable economic and tourism development in Australia.

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Abbreviations and Acronyms

ARTRC	The Australian Regional Tourism Research Centre
DOC	Denominazione d'Origine Controllata (Certified denomination of origin)
EU	European Union
ISS Institute	International Specialised Skills Institute
NAATI	National Accreditation Authority for Translators and Interpreters
PR	Public Relations
PSR	Piano Sviluppo Rurale (a European Union scheme for rural development)
RPL	Recognition of prior learning
TAFE	Technical and Further Education (providers)
VCE	Victorian Certificate of Education
VELS	Victorian Essential Learning Standards
VET	Vocational Education and Training
WRTD	Wangaratta Regional Tourism Development

Definitions

Agritourism The Australian Regional Tourism Research centre (ARTRC) offers its explanation of agritourism:

“Agritourism can be characterised as a business or activity that invites visitors to come on-farm or into a rural community to enjoy agriculture, its produce and the natural environment in which it exists. Agritourism is generally an additional enterprise added to the farm, integrating tourism into agri-business.”

Reference: http://www.regionaltourism.com.au/ARTRC/current_pro.html#fact

Skills deficiency A skill deficiency is where a demand for labour has not been recognised and where accredited courses are not available through Australian higher education institutions. This demand is met where skills and knowledge are acquired on-the-job, gleaned from published material, or from working and/or study overseas.

There may be individuals or individual firms that have these capabilities. However, individuals in the main do not share their capabilities, but rather keep the IP to themselves; and over time they retire and pass way. Firms likewise come and go.

Reference: ‘Directory of Opportunities. Specialised Courses with Italy. Part 1: Veneto Region’, ISS Institute, 1991.

Acknowledgments

Pauline Porcaro would like to thank the following individuals and organisations who gave generously of their time and their expertise to assist, advise and guide her throughout the Fellowship program.

Awarding Body - International Specialised Skills Institute (ISS Institute)

We know that Australia's economic future is reliant upon high level skills and knowledge, underpinned by design and innovation.

The International Specialised Skills Institute Inc (ISS Institute) is an independent, national organisation, which has a record of nearly twenty years of working with Australian industry and commerce to gain best-in-the-world skills and experience in traditional and leading-edge technology, design, innovation and management. The Institute has worked extensively with Government and non-Government organisations, firms, industry bodies, professional associations and education and training institutions.

The Patron in Chief is Sir James Gobbo AC, CVO. The ISS Institute Board of Management is Chaired by Noel Waite AO. The Board comprises Franco Fiorentini, John Iacovangelo, Lady Primrose Potter AC and David Wittner.

Through its CEO, Carolynne Bourne AM, the ISS Institute identifies and researches skill deficiencies and then meets the deficiency needs through its *Overseas Skill Acquisition Plan (Fellowship Program)*, its education and training activities, professional development events and consultancy services.

Under the Overseas Skill Acquisition Plan (Fellowship Program) Australians travel overseas or international experts travel to Australia. Participants then pass on what they have learnt through reports, education and training activities such as workshops, conferences, lectures, forums, seminars and events, therein ensuring that for each Fellowship undertaken many benefit.

As an outcome of its work, ISS Institute has gained a deep understanding of the nature and scope of a number of issues. Four clearly defined economic forces have emerged out of our nearly twenty years of research. The drivers have arisen out of research that has been induced rather than deduced and innovative, practical solutions created - it is about thinking and working differently.

A Global Perspective. 'Skills Deficiencies' + 'Skills Shortages'

Skill deficiencies address future needs. Skill shortages replicate the past and are focused on immediate needs.

Skill deficiency is where a demand for labour has not been recognised and where accredited courses are not available through Australian higher education institutions. This demand is met where skills and knowledge are acquired on-the-job, gleaned from published material, or from working and/or study overseas. This is the focus of the work of ISS Institute.

There may be individuals or firms that have these capabilities. However, individuals in the main do not share their capabilities, but rather keep the IP to themselves; and over time they retire and pass way. Firms likewise come and go. If Australia is to create, build and sustain Industries, knowledge/skills/understandings must be accessible trans-generationally through nationally accredited courses and not be reliant on individuals.

Our international competitors have these capabilities as well as the education and training infrastructure to underpin them.

Addressing skill shortages, however, is merely delivering more of what we already know and can do to meet current market demands. Australia needs to address the **dual** challenge – skill deficiencies and skill shortages.

Acknowledgments

Identifying and closing skills deficiencies is vital to long-term economic prospects in order to sustain sectors that are at risk of disappearing, not being developed or leaving our shores to be taken up by our competitors. The only prudent option is to achieve a high skill, high value-added economy in order to build a significant future in the local and international marketplace.

The Trades

The ISS Institute views the trades as the backbone of our economy. Yet, they are often unseen and, in the main, have no direct voice as to issues which are in their domain of expertise. The trades are equal, but different to professions.

The ISS Institute has the way forward through its 'Master Artisan Framework for Excellence. A New Model for Skilling the Trades', December 2004. The Federal Government, DEEWR commissioned ISS Institute to write an Australian Master Artisan School, Feasibility Plan.

In 2006, ISS Institute Inc. set up a new ISS advisory body, the **Trades Advisory Council**. Members are Ivan Deveson AO; Martin Ferguson AM, MP, Federal Labor Member for Batman; Geoff Masters, CEO, Australian Council of Educational Research; Simon McKeon, Executive Chairman, Macquarie Bank, Melbourne Office; Richard Pratt, Chairman, Visy Industries and Julius Roe, National President Australian Manufacturing Workers' Union.

Think and Work in an Holistic Approach along the Supply Chain - Collaboration and Communication

Our experience has shown that most perceive that lack of skills is the principal factor related to quality and productivity. We believe that attitudes are often the constraint to turning ideas into product and a successful business; the ability to think laterally, to work and communicate across disciplines and industry sectors, to be able to take risks and think outside the familiar, to share – to turn competitors into partners.

Australia needs to change to thinking and working holistically along the entire Supply Chain; to collaborate and communicate across industries and occupations - designers with master artisans, trades men and women, Government agencies, manufacturers, engineers, farmers, retailers, suppliers to name a few in the Chain.

'Design' has to be seen as more than 'Art' discipline – it is a fundamental economic and business tool for the 21st Century

Design is crucial to the economic future of our nation. Australia needs to understand and learn the value of design, the benefits of good design and for it to become part of everyday language, decision making and choice.

Design is as important to the child exploring the possibilities of the world, as it is to the architect developing new concepts, and as it is to the electrician placing power points or the furniture designer working with a cabinet-maker and manufacturer. As such, design is vested in every member of our community and touches every aspect of our lives.

Our holistic approach takes us to working across occupations and industry sectors and building bridges along the way. The result has been highly effective in the creation of new business, the development of existing business and the return of lost skills and knowledge to our workforce, thus creating jobs - whereby individuals gain; industry and business gain; the Australian community gains economically, educationally and culturally.

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Fellowship Sponsor

The Victorian Government, Skills Victoria is responsible for the administration and coordination of programs for the provision of training and further education, adult community education and employment services in Victoria and is a valued sponsor of the ISS Institute. Porcaro would like to thank them for providing funding support for this Fellowship.

Employer Support

Porcaro would like to acknowledge the support received from the management at Kangan Batman Institute of TAFE, in particular, her manager Christine Pontin, General Manager and mentor for the Fellowship, Greg Waddell, and the Director, Ray Griffiths.

Specific Acknowledgements

Without the foresight and efforts of the many people involved in the provision of the Fellowship, such a visionary opportunity would not be possible.

Porcaro would like to thank her family; husband Corrado, children Marcus, Alessia, Lea and Aldo, for their continuing support of her endeavours. A very special thank you to Corrado for his assistance with translations, his companionship on the journey, and for his inspiration and encouragement in the continual pursuit of knowledge.

The Fellow would also like to acknowledge the International Specialised Skills Institute (ISS Institute). In particular, the immeasurable efforts of Carolynne Bourne AM, in her role as CEO, should be acknowledged. Carolynne works tirelessly to assist the Fellows in preparing their applications, refining their study so that it remains focused on skills development, and finally in disseminating the information upon the Fellows' return. Also from the ISS Institute and of great assistance to the Fellows in the drafting of reports, is Paul Sumner whose efforts must be congratulated.

Supporters

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- Ian Nicolson, Service Skills Victoria
- Gary Allen, Product Development Manager, Tourism Victoria

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- Terranostra Regionale, Quality management and promotion for agritourism
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- Lucia Sperotto, Agriturismo Le Bianchette
- Sonia Gonelli, Villa Il Crocicchio
- Maria Teresa Pasetto and Paolo Righetti, Agriturismo le Croibe
- Sergio Padovan, Agriturismo da Sergio
- Frau Plunger, Franzin视角
- Patrick Planerhof, Agriturismo Prackfolherhof

Acknowledgments

Australian Organisations Impacted by a Study of Agritourism

Government

The information gathered through this study is expected to be of particular interest to the following government organisations:

Tourism Australia

<http://www.tourism.australia.com/AboutUs.asp?lang=EN&sub=0281&a=2738>

Tourism Australia's role is to stimulate sustainable international and domestic demand for Australian tourism experiences through industry leadership and coordination, and to influence the actions of the industry's tourism and travel marketing by:

- Championing a clear destination marketing strategy
- Articulating and promoting a compelling tourism destination brand
- Facilitating sales by engaging and supporting the distribution network
- Identifying and supporting the development of unique Australian tourism experiences, especially indigenous
- Promoting Australia as a desirable destination for business events
- Gathering and communicating reliable market intelligence and insights for improved decision making
- Working with partners who can extend Tourism Australia's influence.

Tourism Victoria

<http://www.tourism.vic.gov.au/about-us/our-role/>

Tourism Victoria's role was established to actively market Victoria as a premier tourism destination in Australia to both domestic and international visitors. Tourism Victoria's objectives are as follows:

- Market Victoria as an interstate and international tourist destination
- Increase the number of travellers to Victoria
 - Travellers' or tourists' length of stay at destinations in Victoria
 - The use of tourist facilities in Victoria
- Increase the amount of travel within Victoria and the use of tourist facilities by Victorians
- Improve and develop tourist facilities in Victoria
- Support and coordinate the provision of tourist facilities in Victoria
- Provide more efficient and effective utilisation of investment in travel and tourism in Victoria.

AgriFood Skills Australia – <http://www.agrifoodskills.net.au/>

Service Skills Victoria – the industry advisory board for skills development

Heritage Victoria – <http://www.heritage.vic.gov.au>

National Trust – <http://www.nationaltrust.org.au/>

Acknowledgments

Industry

- Agritourism organisations throughout Victoria such as in Gippsland, the Yarra Valley and King Valley
- Small businesses and the rural population of Victoria
- The AAA – the federal representative of the state and territory motoring clubs such as NRMA and RACV

Professional Associations

Tourism Alliance Victoria

<http://www.tourismalliance.com.au/tourismalliance/index.html>

Tourism Alliance Victoria is the peak industry body in Victoria and focuses on developing an increasingly dynamic tourism industry in Victoria. Its strong and diverse membership base gives the organisation a state-wide perspective on all issues affecting Victorian tourism, as well as a precise understanding of specific local requirements.

Education and Training

- Kangan Batman TAFE
- The Victorian Tourism and Events Educators' Network (VTEEN)

Community

- Rural communities throughout Victoria

About the Fellow

Name: Pauline Porcaro

Employment

Senior Educator, Tourism, Kangan Batman TAFE, Broadmeadows, Victoria (Since 1993)

Qualifications

- Masters of Education (Work and Learning Studies), Monash University
- Graduate Diploma in Education, La Trobe University
- Bachelor of Arts with a Major in Art History, La Trobe University

Memberships

- Member of the Victorian Tourism and Events Educators Network (VTEEN).

Porcaro is a passionate educator who was awarded the Kangan Batman TAFE 'Teacher of the Year Award' in 2004, as well as being one of three finalists for the Victorian Training Awards for the 'Outstanding Teacher of the Year Award' in the same year.

As a 'Freirian' educator who believes strongly in the power of education as the vehicle for people to make choices and changes to their lives, she continues to seek ways to improve herself as a teacher, to stay ahead of current trends and to inspire students to carve out new paths. Hence the reason for her Fellowship journey.

For many years, Porcaro's students have won state awards in the 'Developing Tourism Leaders' Awards' whereby students design a new tourism business for Victoria. The Fellow aligns this program strongly to the Tourism Victoria plans and research documents for the development of the industry in Victoria. It was during this research that she initially realised that agritourism was nominated as a particularly important growth area for Victorian industries.

"In many parts of rural and regional Victoria, tourism's success is based (amongst other things) on its ability to add value to existing local industries such as agriculture, manufacturing or forestry. The health of those industries, therefore, is as important to the prosperity and sustainability of tourism." (<http://www.tourismalliance.com.au/Downloads/Tourism%20Alliance%2010%20Yr%20Plan%20Response.pdf>)

Porcaro's students enter the government funded competition for final year tourism and hospitality students (aimed at both TAFE institutes and universities throughout Victoria) every year. In 1999, she developed an innovative holistic delivery and assessment program and since its inception her students have won more prizes than any other institute and have taken out first prize four times. This has been seen as an outstanding effort given the institute's demographic area is one of very low income families, high unemployment, and a high migrant population. Porcaro believes with the information obtained during the Fellowship program she can take this important student program to new heights and she has already established contact with the newly formed Gippsland Agribusiness group.

This group is seeking to establish a growth of agribusiness in the Gippsland area in order to give it a competitive edge and draw tourists away from more competitive areas like the Yarra Valley. It is Porcaro's intention to work with this group and others to spread the word of agritourism and inspire new operations throughout Victoria. Given her background in writing tourism business plans, she hopes to establish an online training program for the rural community, so they may have the resources and assistance to develop new tourism businesses throughout Victoria.

Aims of the Fellowship Program

A study of the Italian model of agritourism and its produce can benefit the growth of agritourism in the Australian tourism industry. It is important to note that successful tourism products are built around a complex mixture of the product, position, price, place, packaging and promotion of those products, and much can be learnt from the experiences of successful tourism world leaders.

The Italian definition of agritourism is “...activities of hospitality performed by agricultural entrepreneurs and their family members that must remain connected and complementary to farming activities” (Legge Quadro Nazionale sull’Agriturismo 1985, art.2 [Sonnino, p.286]).

Careful consideration of the Italian objectives for the growth of agritourism demonstrates a clear model on which we can build our own sector. The strategic objective is “to halt rural out-migration by keeping farmers on the land” (Ibid). Additional objectives are:

- Improved utilisation of both natural and built rural resources
- Enhancement of environmental conservation and management
- Promotion of ‘typical’ rural products
- Support for rural traditions and cultural initiatives
- Development of agricultural areas
- Development of youth and social tourism
- Enhancement of the relationship between city and countryside (Ibid)

The rationale for the study trip was to visit a range of ‘agriturismo’ businesses and gather information on how they operate and market, with a focus on their ideas on packaging of regional produce, the quality labelling of agritourism, and the cooperative coordination of the agritourism groups. There were clear things to learn from the model:

“To retain competitiveness in this area it is important that the industry continues to excel ...as well as developing new, exciting and unique initiatives. Increasing national and international interest in food and wine tourism and evolving consumer needs require Victoria’s food and wine tourism businesses to continually review their product offering in order to remain competitive. ...Certainly, it is imperative that destinations and regions identify, promote and deliver point of difference visitor experiences.” (Tourism Victoria, Food and Wine Plan, 2004-2007, p.30)

The result of the study tour aims to assist in the growth of the Australian Agritourism Industry. The specific aims were:

- To develop guidelines for effective label promotion of mega regional agritourism product brands
- To design guidelines for agritourism product development by establishing and listing the needs of agritourism consumers from a quality perspective
- To provide guidelines to industry on effective coordination and cooperative marketing platforms
- To develop a training program for rural communities to design effective agritourism regional products

The Australian Context

A Description of the Industry

The ten year Tourism and Events Industry Strategy highlighted the following key points in relation to Australia's growing tourism industry, with particular note to the growth of tourism in regional Victoria:

- Tourism contributed \$10.9 billion or 5.3% to the Victorian economy in 2003/04, with \$3.4 billion specifically to our regional economy. The industry employed (directly or indirectly) 159,000 Victorians (6.6% of the state's workforce). Of that number 61,000 people were from regional areas.
- 1.3 million international visitors spent over \$2.6 billion in Victoria in 2004.
- International and interstate visitors make up for two thirds of tourism expenditure.
- Victoria's compactness and diversity and excellent regional road network make it a competitive Australian tourism destination.
- Revenue and employment in regional areas have increased by 31% and 13% respectively since 1997/98.
- Tourism is on target to become one of the biggest contributors to our economy.
- It is projected that tourists from overseas will make up 70% of overall tourism growth and almost 40% of tourism expenditure by 2016.
- Tourists are now demanding more sophisticated and varied experiences.
- Government works with the regional tourism industry to develop marketing programs to attract Victorians, interstate and international visitors to regional Victoria, having pledged large sums of money to develop provincial Victoria.

Government is expecting a huge growth in food and wine tourism. Victoria's Food and Wine Tourism Plan 2004-7 outlined the following key points of note to the growth of agritourism in the state:

- The estimated economic value of Victoria's winery tourism for 2002 was \$412 million, an estimated increase of 10% since 1998.
- Visitors reported that food related experiences are either extremely important, or very important when choosing a wine region to visit.
- There is a growing need for wine regions to strengthen their point of difference in product development.
- While food services such as in-vineyard dining options, are increasingly available, the standard of service is not always consistent in many areas.
- The Department of Primary Industries aims to bring together the tourism, food, wine and agribusiness industries and promote personal service, quality and sustainability.
- There still needs to be ongoing development and integration of wine and food groups and strengthening of agribusiness and tourism networks.
- Raising industry professionalism and standards has been identified as an essential challenge and opportunity for Victoria.
- The appreciation of slow food, sustainable lifestyle experiences as opposed to fast food hype, is a consumer trend of significance.
- Tourism Victoria aims to develop and implement a public relations campaign that includes the use of regional signature dishes, produce, personalities, and events to 'hero' the distinctive style and character of each region and encourage an associated food/wine brand identity.

The Australian Context

The Agriculture Industry

On the other hand, while tourism continues to grow, the agriculture industry struggles:

- Business confidence deteriorated in the June quarter of 2008 with falls recorded in all states and sectors. The outlook for Australian agribusinesses in the September 2008 quarter was negative (Agribusiness Index June Quarter 2008, p.1)
- Overall, agribusinesses across Australia experienced less than satisfactory profit levels (-0.24%) in the June quarter with profitability falling from the March quarter (-0.14%). Profit levels remain higher than that reported in the June quarter of 2007 (-0.30%). (Ibid p.3)
- Nationally, 66% of agribusinesses felt confident about the performance of their business over the next 12 months into 2009. This is a decrease from 72% in the previous quarter, and lower than the 77% recorded in the June quarter 2006. (Ibid p.4 <http://www.westpac.com.au/internet/publish.nsf/Content/BBBIAGRAR+Westpac+and+Charles+Sturt+University+Agribusiness+Index>)

It is interesting to note that even though Australian farmers struggle, they appear to be quite self sufficient, with lower than average assistance from government:

“Despite common misconceptions and the worst drought on record, government support for Australian farms represents just 6% of farming income. By comparison, according to the Organisation for Economic Cooperation and Development (OECD), in Korea it is 63%, in Japan 53%, in the European Union 32%, in Canada 23%, and in the United States it is 11%. ...In fact, Australian farmers are among the most self-sufficient in the world.” (OECD, Agricultural Policies in OECD Countries: Monitoring and Evaluation 2007. <http://www.nff.org.au/farm-facts.html>)

Also of note to the development of agritourism in Australia is the number of farms available: *“There are 154,472 farms in Australia – including those for whom farming is not their primary business. However, there are 137,969 farms solely dedicated to agricultural production, as the table below reflects.”*

State	No. of Farms	% of Total
NSW	43,268	31.4
Victoria	33,310	24.1
Queensland	28,905	21.0
South Australia	14,901	10.8
Western Australia	12,872	9.3
Tasmania	4,068	2.9
Northern Territory	564	0.4
ACT	81	0.06

Australian Bureau of Statistics, Agricultural Commodities 2005/2006 (Ibid)

How the Need for Additional Skills was Recognised

There is much evidence for Australia to move in the direction of value adding to regional produce through agritourism. The analysis which pointed to a need for agritourism growth came to light while the Fellow was teaching business planning to tourism and hospitality students. The following quotes were important in recognising the skills deficiency in Victoria and the importance of our industries merging to create better products for the increasingly savvy and demanding consumer seeking niche market products:

- *“There is an identified need to enhance industry cohesion and leadership, increase the quality of the visitor experience and explore opportunities for food and wine infrastructure developments.”* (Tourism Victoria, Food and Wine Plan, 2004-2007)
- *“...there is a need for quality accommodation in regional Victoria to leverage the ability for induced visitation to the regions to increase overnight stays and yield.”* (Ibid)
- *“More effective marketing and promotion of the industry... ie greater collaboration between the wine, food and tourism industries.”* (Ibid)
- *“A significant trend is the convergence of some sectors, with a continual blurring of the boundaries as the number of enterprises that cover two or more sectors steadily increase. A major contributor to this is the rise of ‘experience purchasing’, where customers are demanding increased integration of products and services.”* (Industry Change Driver’s Report, 2005)
- *“Training for micro to medium sized businesses will become critical to remain sustainable and competitive, particularly in regional Victoria. A major source of recruits for this industry is owner/manager roles.”* (Ibid)

Tourism Victoria in particular has identified the development of Victoria’s food and wine industry as integral to the growth of tourism in the state. The concept of agritourism provides an appropriate response to this need. The Victorian Tourism Food and Wine Action Plan (Tourism Victoria, Food and Wine Plan, 2004-2007) identified the following strategies for agritourism growth:

- Encourage the development of packaged wine and food experiences to market interstate and overseas. Focus on facilitating conversion in online environments.
- Develop an information kit for culinary ‘ambassadors’ and other key food and wine industry members, that includes fact sheets about the importance of the tourism industry and the promotion of local produce.
- Encourage training and educational opportunities for the regional food and wine tourism sector that meet the needs of small business, eg: workplace based training.
- Encourage strategic alliances and cooperation between regional food and wine groups and local and regional tourism organisations.
- Explore opportunities for agritourism investment and development.
- Ensure tourism industry input at agribusiness forums.

The Benefits of the Study

“Food that is expressive of a region and its culture can be used as a means of differentiation for a destination in an increasingly competitive global marketplace.” (Hall: 1993, <http://www.qub.ac.uk/ep/research/span/events/nrt/k-svail.pdf>)

The Fellowship provided an opportunity to investigate ‘value adding to regional produce’ with the idea of Australian food and wine producers supporting their agricultural businesses through agritourism. Andrew McEvoy from Tourism Australia opened the Australian Food and Wine 2005 conference stating:

“Wine and food are natural partners – a partnership that extends to tourism, where the lure of fine wine, great dining, beautiful scenery and a gorgeous place to stay brings thousands of tourists to Australia’s cities and regional areas. With hundreds of small wineries struggling to find a route to market, and increasing competition among restaurants for customers and yield, tourism provides an opportunity to carve a niche in the wine and restaurant markets and ensure profitability.” (<http://www.sapo.org.au/binary/binary2581/Food.pdf>)

The Italian model can provide a best practice example for the future of our tourism industry which will have the following effects:

- Create jobs
- Stimulate the development of agritourism
- Help stop the migration of people from country Victoria to the major cities
- Create strategic product development initiatives related to value added produce
- Encourage rural businesses to develop and expand within local communities, and to develop a range of new products
- Enhance community pride, heritage, nature conservation and rejuvenate regional culture
- Create opportunities for indigenous communities to develop product aimed, in particular at the international market, to educate tourists on indigenous culture
- Enhance the quality of life of rural communities and create opportunities
- Support our agriculture industry
- Reduce the impact of seasonality on rural communities
- Create opportunities to break into the global marketplace and attract visitors to regional areas and away from major cities to increase employment and grow strong communities in regional Victoria
- Increase the income of our farming community

If we are to continue to be a clever country, to be world leaders in industry, and to continue to ensure Australia’s economic future, it is imperative that our educators be not only continuously developed, but be exposed to global knowledge and skills. Educators have the ability to spread the word to our youth, to inspire them to be global leaders, and to motivate change and development in our industries. TAFE Institutes deal with hundreds of young people each year who are the future of our industry and the future of our nation.

It is important for the growth of a nation to be proactive and not reactive in order to be world leaders. Educating our educators, which is what the Fellowship ultimately does, means Australia is investing in the future of our youth and ultimately this country.

The Australian Context

The aim of this Fellowship journey was to report to industry bodies and contribute to training on evidence of best practice in the Italian agritourism business.

Teachers must continue to learn and be at the forefront of their industry and must demand the right to have access to new information. In the words of Paolo Freire:

“Tomorrow is neither a necessary repetition of today, as the dominant would like it to be, nor something predetermined. Tomorrow is a possibility we need to work out, and, above all, one we must fight to build.” (<http://www.blackwell-synergy.com/action/showPdf?submitPDF=Full+Text+PDF+%2857+KB%29&doi=10.1111%2Fj.1467-9620.2005.00634.x&cookieSet=1>)

In addition to educating, the Fellowship offered a splendid opportunity to engage in global networking; individuals seek out and determine leaders in our industries and utilise those contacts back here to further develop our knowledge base. It is impossible for government to create these important contacts at such a microscopic level. Governments work in the macro environment; individuals have the opportunity to create the close relationships required to gain expertise at operational levels in our respective industries.

Our industries ultimately benefit from the Fellows’ journeys, not only in terms of sharing knowledge with the current industry, but ultimately through the multiplier effect with each Fellow’s learning being shared through the access to so many young industry minds in the educational institutions where they work. In developing teachers we ultimately develop students as well.

SWOT Analysis of Agritourism in Australia

A strengths, weaknesses, opportunities and threats (SWOT) analysis provides a useful avenue for summarising the current situation and the implications of addressing, or not addressing, the need for ongoing skills associated with the development of agritourism in Australia.

Strengths

- The concept of the development of agritourism in Australia meets the proposed direction of both Tourism Victoria and Tourism Australia
- The Fellowship research was supported by Tourism Victoria
- Official letters of support from Agribusiness Gippsland and Service Skills Victoria
- Concept proposes to mesh two of Australia’s largest industries: agriculture and tourism
- Strong evidence for demand of a quality agritourism product
- Quality agricultural products are available in Victoria
- Victoria is currently the only state in Australia that has wineries in every tourist region
- The State of Victoria is small enough for driving holidays; all regions can be reached in a day’s drive
- Tourism Victoria has a persistent and ongoing promotion of Victoria domestically and internationally
- Excellent industry communication platforms exist with bodies like Tourism Victoria, Service Skills Victoria, and Tourism Alliance
- Tourism Victoria is promoting Victoria as the food and wine capital of Australia

The Australian Context

Weaknesses

- The understanding of the concept of agritourism in Australia is limited
- Government support for farmers to start up in agritourism is limited
- Distances in Australia are not as conducive to agritourism compared to somewhere like Italy
- Unlike Italy, there are no strong historical links with food and regions in Australia
- Farming communities are separated by greater distances than those in Italy – acting as a barrier to good communication platforms for farmers

Opportunities

- Availability of government grants in e-learning to further the project with an electronic course for farmers
- Business planning programs and a previously developed work book can be adapted for the agritourism market
- Tourism Victoria's Product Development Department and Food and Wine Project Officer supply support for farmers in the development of the business
- Media exposure has occurred due to the interest in both agriculture and tourism
- Tourism Victoria has excellent connections with a range of relevant journalists
- Annual tourism conferences in Victoria run by Tourism Alliance and Tourism Victoria give opportunity to spread the agritourism model word
- Support exists from ISS Institute to spread the knowledge gained
- To create strong alliances with agritourism groups in Italy to further the development of agritourism in Victoria
- To introduce the concept of agricamping to the Australian agritourism sector

Threats

- Italian businesses were occasionally limited by commercial 'in-confidence' regulations
- No uptake on idea from industry
- Australians not warming to the idea of agritourism
- More 'trendy' ideas like eco-tourism taking the focus
- Global warming changing the production of food and wine in Australia

The Skills Deficiencies

Skills Deficiencies

As already established, the ISS Institute define skills deficiencies as “...where a demand for labour has not been recognised and where accredited courses are not available through Australian higher education institutions. This demand is met where skills and knowledge are acquired on-the-job, gleaned from published material, or from working and/or study overseas. This is the key area targeted by the ISS Institute.” (<http://www.issinstitute.org.au/about/about.html>)

In competitive market economies skill requirements are subject to continuous change. These changes may be caused by emerging marketplace trends, new products on the market, the invention of new technologies, or a simple change in the way we work.

To ensure Australia's competitiveness on a global scale it is recognised that we need to identify skill deficiencies and shortages and implement training in order to maintain economic growth. Skills deficiencies and shortages are directly associated with education and training; we must identify needs and ensure our training institutions are equipped to provide training for both those needs. The Veneto Fellowship program identifies these skills deficiencies and then funds Fellows to travel to the Veneto Region in order to acquire those skills, knowledge and understandings not found here in Australia.

Identifying and Defining the Deficiencies

The Fellow's trip to Italy, in particular the Veneto and the Alto Adige regions, was an opportunity to conduct an analysis of the successful Italian agritourism model. Italy, being the world leader in this field, has refined an excellent agritourism product model.

A report on agritourism businesses in Australia demonstrated the limitation of this industry here and identified the skills and knowledge we need to build in order to create an effective Australian model. Limitations include:

- Lack of information about the needs of agritourism consumers and their perceptions of quality makes developing the product difficult
- Limited guidelines concerning the consistency of product quality and facility design
- Limited effective rural sign posting for promoting visitor awareness and access
- Limited co-ordination, organisation and joint co-operation in marketing
- Limited awareness building and training programs for potential providers of agritourism
- Lack of technical assistance and training
- Inability to generate adequate economic returns
- Insufficient resources to warrant new investments
- Difficulty in obtaining finances to develop necessary physical resources and services
- Concern about visitors negatively impacting farming operations
- Concern over legal liability if visitors are injured
- Lack of critical mass of attractions and amenities with which to attract travellers to a destination
- Inappropriate facility design

(<http://www.rem.sfu.ca/pdf/agritourism.pdf> – Agritourism Market and Product Development Status Report, p.73)

The Skills Deficiencies

With these points in mind the Fellow sought to select quality agritourism businesses and their related government and non-government marketing bodies to:

- Identify quality controls for agritourism product
- Identify joint cooperative marketing models
- Identify any formal training for agritourism providers
- Identify controls in place to reduce negative impacts on farms
- Establish the steps in setting up a value-added regional produce brand
- Report on size of operations and volume of sales
- Analyse the elements that contribute to 'region pull' for clients looking for an agritourism style holiday
- Analyse the return on the mix of product offered by agritourism operators

The specific skills and knowledge to be attained from these agritourism businesses includes:

- Selecting the best locations for agritourism growth
- Building acceptance of the agritourism model and subsequently communication platforms in farming communities
- Establishing quality criteria for agritourism providers and for their products
- Establishing successful sales with a successful product mix
- Developing the regional produce concept
- Developing effective label promotion of the regional produce brand

Why the Deficiencies Need to be Addressed

A study of these skills and the subsequent report back to the industry in Australia provides a valuable opportunity to assist in the growth of the agritourism sector.

Victoria in particular has the quality of product and an appropriate land size with quality agricultural regions to grow a healthy agritourism industry. We do have many farmers already opening up small businesses from their rural position; however, the sector is developing in a haphazard and disorganised fashion.

The Italian model demonstrates persistent coordination in the development and marketing of the product and it is this which we need to achieve in order to develop a world-renowned agritourism sector. Ultimately with this knowledge it is hoped we can build a sector which sees visitors from around the world being motivated to come to Australia to try out our agricultural products while they holiday.

The International Experience



http://goitaly.about.com/library/bl_tuscany_rail_maps.htm

The Destinations and Objectives

The course of this study took the Fellow through three main regions of Italy, each selected for particular reasons – Tuscany, Veneto, and Trentino Alto-Adige, with the majority of the time spent in the Veneto Region.

The Significance of Tuscany

Tuscany was selected as a brief stopover point on the way from Rome to the Veneto Region. It was selected due to its abundance of agritourism product. Speaking with Italians about the concept, almost all mentioned the strength of agritourism in the region.

Tuscany is known as the leader in Italy due to its sheer volume of product. Agritourism started in Tuscany and grew rapidly due to the growth of Tuscany as an iconic tourism region in Italy and the number of agricultural businesses, in particular, wineries in the region.

The Significance of the Veneto

The Veneto Region is of particular significance to agritourism due to the size of farms in the area and the range of terrain. Roxanne Clemens identifies that:

“...the Veneto terrain is a mixture of flat plains (57 percent), hills (14 percent), and mountainous areas (29 percent). The region has approximately 15,000 farms, and the average farm size is 4.5 hectares (11.25 acres). Given the small size of most farms, producers must generate large returns on their output to earn enough to support a family without the need for off-farm employment.” (<http://www.card.iastate.edu/publications/DBS/PDFFiles/04mbp8.pdf>)

A study of this small, but varied geographic region with its flat terrain and similar population of about 4 million people is of significance to Victoria. Additionally, the size of the farms in the Veneto means there can only be limited production; this is relevant to many parts of Victoria, where due to natural causes like drought, floods and bushfire many farmers also find it difficult to make ends meet on the land.

Like Tuscany, the Veneto Region boasts significant quantities of vineyards and agricultural produce, in particular corn and barley.

The Significance of the Trentino Alto Adige Region

With an agritourism supply only second to Tuscany, this northern region of Italy was chosen for its innovation in branding of the agritourism product. The ‘Gallo Rosso’ (Red Rooster) project is an innovative and successful label created by the Farmers Union in response to the needs of farmers to increase their income due to very small farm size in the region.

Here many farms are built on the sides of mountains or in very difficult terrain, meaning farm work must be done by hand, given farming machinery is unable to be used on the steep terrain. With limitations on their output, farmers sought ways of supplementing their incomes and hence the birth of the brand ‘Gallo Rosso’.



<http://goitaly.about.com/od/veneto//bl-veneto-region-map.htm>



<http://goitaly.about.com/od//bl-trentino-Alto-Adige-map.htm>

The International Experience

The Interviews and Site Visits

In order to obtain an overview of the Italian agritourism model, the following people/businesses were chosen:

The Government Perspective: Renato Francescon, Director of Integrated Tourism Marketing (Agritourism and Wine Tourism), Regional Tourism Association, Veneto.

It is important to understand the different levels of government in Italy; firstly there is the National Government, equivalent to our Federal Government; next there is the Regional Government, like our State Government; then the Provincial Government, a level of government non existent in Australia, where each region is divided into provinces, similar to the American idea of counties eg: the Veneto has seven provinces. Finally, there is the 'commune' or the city council for each town or city, like our local councils.

The Marketing Perspective: Dr Hannes Knollseisen, Marketing Manager, Gallo Rosso

The Operators' Perspective:

Standard and Type	Operator/s	Business Name
Basic – agricamping	Signor and Signora Sergio Padovan	Agriturismo da Sergio
Medium – apartment (a Gallo Rosso property)	Herr and Frau Plunger	Franzinhof Agritourism
Medium – room, with didactic farm	Lucia Sperotto	Agriturismo Le Bianchette
High – room, on the Valpolicella wine road	Maria-Teresa Pasetto and Giampaolo Righetti	Le Croibe Agritourism
Superior – room, resort	Sonia Gonelli	Il Crocicchio

The Government Perspective: Regional Tourism Association

Contact: Renato Francescon, Director of Integrated Tourism Marketing (Agritourism and Wine Tourism), Regional Tourism Association, Veneto

Renato Francescon explained the role of the Regional Government, the appropriate laws that govern the way agritourism works in Italy and specifically in the Veneto Region. Agritourism was defined by state law in 1985 which set the parameters on which operators could set up and run their agritourism businesses. After the initial law was passed each level of Regional Government set about drawing up their own legislation on how agritourism would operate in their area.



Renato Francescon and Pauline Porcaro

Up to 1991 the region played a greater role in controlling and managing agritourism, however, since then the daily detail of administration has been delegated to the provinces, with the region now controlling the programming, promotion, legislation and distribution of funds for agritourism.

The International Experience

The 'legge quadro', the national umbrella legislation, defined agritourism as an agricultural activity in its own right with the complementary aspect of tourism. This definition stated that agritourism cannot exist unless there is a pre-existing agricultural activity. In other words, the working farm must come first, not the other way around, and the complementary element of tourism cannot take precedence in terms of working hours over the pre-existing agricultural business. Basically the tourism business is the junior partner of the agricultural business. These are the prerequisites of any agritourism activity as defined by the Italian parliament. On the basis of this definition set out by parliament, the Italian regions have further defined their own legislation around agritourism.

In the Veneto Region there are strict regulations on setting up and running an agritourism activity. First and foremost they adhere to the law that the tourism business may not take precedence. However, in the Veneto this is defined by the amount of time dedicated to each aspect of the agritourism; each farm activity has been given a 'tempo lavoro' (work time), meaning every agricultural activity has a nominated time assigned to it and the region has designed a 'tempo lavoro' template.

Francescon provided a hypothetical example – to look after 20 cows takes 200 days a year, a working day is considered 6.5 hours; looking after a tourism bed takes 20 minutes a day. The calculation must be made on how many beds by how many days per year – the sum of which must ensure that the agricultural activities must prevail over the tourism activity. Additionally each agritourism activity is given a permitted maximum eg: 30 beds per agritourism is considered the absolute maximum in the Veneto.

The first laws for the Veneto Region were made in 1986; these were consequently amended in both 1991 and 1997 in order to meet the changing tourism climate and market demands. The 1997 law is currently under review and modifications are expected. The aim of the current modifications, which are still under discussion, is to make the tourism business more dynamic and flexible, allowing operators to modify their businesses according to the trends in the marketplace eg: if horse riding is the trend, then operators will be able to work together with other local businesses who offer horse riding to extend their product. In other words, the changes will make way for agritourism businesses to combine with other local farms to further develop their product and extend the agritourism beyond the boundaries of the farm gate.

It is acknowledged by government that it would be too costly for operators to modify their nuclear businesses to keep abreast of each new trend; this multi operator strategic development will meet market demands without great cost to the individual farmers. The new laws will facilitate more opportunity for operators to network within communities to develop better product.

Francescon alluded to another modification that will appear in the new law as the term 'agritourism' is currently not mentioned in any EU laws. The new law hopes to rectify this by establishing a connection between agritourism and rural tourism which is the term used in EU legislation. The exponents of agritourism quite rightly see rural tourism as a completely different concept; a tourism business in a rural area that is not necessarily on a working farm. They are going to incorporate the definition of rural tourism in their new laws so the difference between the two is clearly defined. The new definition between rural tourism and agritourism will be important for the government to make decisions on where their funding goes.

The International Experience

The Building Regulations

The regulations on operators do not stop with the balance of the agricultural and tourism side of the business; the development of buildings for the purpose of tourism is also heavily regulated. Under Veneto law, farmers wishing to open an agritourism business are not permitted to construct any new buildings on their property and may only use the existing buildings. Additionally, buildings that were primarily for agricultural purposes may not be renovated for tourism purposes unless they are no longer required for conducting the agricultural business eg: a stable that is no longer used because the farm does not keep those animals anymore can be modified and adapted for agritourism purposes.

However, a farm building which is in current use for farming purposes may not be altered. This ensures that farmers cannot sacrifice their prime business in favour of tourism and there can be no alteration to the landscape with new buildings. Extensions to existing structures are limited to the main house and must not exceed 1,200 cubic metres. Building, however, is not restricted for the agricultural side of the business where normal building regulations apply.

The philosophy behind this regulation is to reuse resources that are already available and to retain the style of architecture prevalent to the area. Given the historic nature of the many buildings in the Italian countryside this law does much for retaining their history while extending accommodation supply in a sustainable way.

According to Francescon, the two pillars of agritourism are the tourism operator and the existing agricultural business, so other than the restrictions on the balance of the business and the maintenance of the historical buildings, the law is quite flexible, leaving much up to the operator in the design of the business.

A Financial Merry-go-Round

Agritourism in Italy is fully supported by government, given this is a country where tourism is one of its major industries. Government funding is available to farmers in order to develop either a new agritourism business or to further develop an existing agritourism business. The funds are government subsidies – ‘a fondo perduto’ (lost funds), meaning operators are not required to reimburse any money to government. The main directive placed upon the agritourism operators who receive this funding is that they are committed to operating for at least ten years after receiving the funds.

The Veneto Region obtains some of its funds through a European Union scheme called the PSR (Piano Sviluppo Rurale). These funds are allocated on a cycle basis and the first cycle was between 2000-2006. During this cycle the Veneto Region spent €36 million between 2000 and 2006 to support the development of agritourism. The next cycle of funding saw the region receive the first instalment under the PSR of €4.5 million allocated to agritourism, but current projections for the Veneto Region are that they will surpass the €36 million of the previous cycle in the next funding period.

Francescon believes the agritourism system they have developed is positive from all aspects. The farmer has access to government funds to maintain and develop his property, and at the same time farmers make money from the tourism business. During this time the farmer is self-sufficient and as a bonus is paying additional taxes to the government. In Francescon's and in his government's mind, this is a win-win situation.

The International Experience

The Regional Government and its Marketing Role

Given the obvious benefits of agritourism to all involved parties, it is in the government's interest to promote agritourism in the region. The region has not officially analysed the importance of the 'region pull' of agritourism, but is intent on providing a broad range of services for their inbound visitors. Agritourism is good for the region as it opens the doors to more visitors and it makes good business sense to be part of the creation of additional product in the area. Agritourism complements the Veneto tourism product; this is a very fertile area boasting extensive farming land with much opportunity for agritourism.

The Regional Government has developed an agritourism website linked to their general tourism website as well as a range of appropriate publications:

- <http://www.veneto-agriturismo.it/index.php>

An extensive annual print guide of agritourism in the region is currently being cut back in favour of the website and smaller, more directed publications that market aspects of the agritourism products available eg: 'The Veneto Educational Farms Guide' (see Attachment 1 for an excerpt). An extra feature of the Veneto is that the general marketing of the Veneto tends to present the region with agritourism being a part of the whole.

In addition to being marketed by the region, each agritourism in the region belongs to one of the four main agritourism associations:

- Agriturist: <http://www.confagricoltura.it/Pages/default.aspx>
- Agrivacanze: <http://www.agrivacanze.net/>
- Terranostra: <http://www.terranostra.it/>
- Turismo Verde: <http://www.turismoverde.com/>

Each of these organisations markets the range of agritourism products throughout Italy, and the region subsequently also promotes these organisations in their publications, presenting an holistic marketing effort.

At present the region has not developed a ratings system for its agritourism accommodation. Although this has been mooted there is much debate on how one rates an agritourism facility; is it on the facilities of the accommodation, or should it be on the range of experiences offered on the farm itself? Francescon referred to the 'spighe' (wheat sheaf) rating system used in Tuscany, however, he believes the Tuscan culture of agritourism to be very different to the Veneto experience, with Tuscany concentrating simply on the accommodation and not on the whole farm experience, which is a feature in the Veneto.

The Agritourism Product in the Veneto

There are 1,167 agritourism operators in the Veneto Region (see Attachment 2 for complete breakdown). They offer:

- A restaurant service = 644
- Accommodation = 627
- Recreational activities = 177
- Product sales = 490
- Agricamping = 39
- Wine tasting and snacks = 563

(Note: some agritourism operations may offer more than one service).

The International Experience

There was a 13% growth in the number of agritourisms in the Veneto from January 2006 to June 2008. The highest growth (11.99%) was in agritourisms who offered their own farm products for sale, with wine tastings in second place for growth (1.36%) and accommodation the third highest growth sector (1.11%). The largest decrease was in agritourisms offering recreational activities (-15%), and secondly those offering restaurant service (-4.6%). Porcaro spoke with operators in the Veneto who indicated that this drop in restaurant service could be due to more complex hygiene regulations and the time required to offer food. It is more difficult to gauge why there was a severe drop in offering recreational activities. This requires further empirical research and consideration.

Francescon advised the region did not need to actively seek new agritourism operators; the funding available ensured the Veneto Region had adequate requests from prospective operators. Initially the largest sub-sector of the Veneto agritourism product was the restaurant sector, given the operator had access to quick cash flow in respect to other activities. He explained that during the first ten years of funding for operators there was limited money available, so funds were administered according to demand. Within the subsequent ten-year period, funds increased and the sector diversified. Funding at that point was increasingly directed at accommodation providers. The region has recently identified the sale of products as the highest growing aspect of agritourism currently in their area.

The Marketing/Branding Perspective – The Gallo Rosso Brand

Contact: Dr Hannes Knollseisen, Marketing Manager, Gallo Rosso Project, Südtiroler Bauernbund (South Tyrol Farmers Union)

Website: <http://www.redrooster.it/en/>

The Gallo Rosso brand is located within the alpine rural region of the South Tyrol, or Alto Adige, in the northern Italian region of Trentino Alto Adige. The South Tyrol region of Italy is a land of mixed heritage. Once under Austria, the area became part of Italy under the negotiations at the end of World War 1 in 1918. The heritage of the people, however, could not be divided so easily and, even today, the people of the area are more linked to their Germanic origins than they are to the country they now call home.

For this reason the first language in the area tends to be German, with Italian in some cases being a limited second language. The Gallo Rosso (www.gallorosso.it) for this reason is also known as the Roter Hahn (www.roterhahn.it). All the marketing for this brand is done in two languages, German and Italian, although their website has also been developed in a third and fourth language, English (www.redrooster.it) and Dutch (www.rodehaan.it).

The brand commenced in 1999 in response to significant problems with occupancy in the area and low revenue for accommodation. People were not engaged with the area; they had the offer, but no union or entity that promoted it. There was an abundance of agritourism, but it was not selling. The farmers' union who represent the interests of the farmers in the area, lobbying for services and for political reasons, saw the need to market their local agritourisms and hence started the Gallo Rosso brand. There are currently 22,000 members of the farmers' union in the South Tyrol.

The International Experience

The union created the Gallo Rosso brand with two main objectives; to promote the region and increase the sales for the agritourism operators in order to give the farmers an opportunity to increase their income. Knollseisen clarified their position: *“Our work is not to create the offer but to create the demand”*. The Gallo Rosso mission is *“To put people in touch with the rural world of the South Tyrol”*. It is of particular note here that farms are small with a low level of mechanisation and, therefore, have limited output because of the steep terrain, so in order to keep farmers on the land, alternative income sources were needed; the promotion of agritourism was of high priority.

The Gallo Rosso offers its members the following services:

- A business consultancy service for the agritourism operators
- Participation in training courses and agritourism conferences
- Advertisements in the Gallo Rosso catalogues
- Exposure on the websites in four languages
- A range of Gallo Rosso marketing – for example newspapers, radio, TV and trade shows in Italy and beyond
- Regular newsletters containing business development ideas

Additionally, the Gallo Rosso offers the operator the chance to be part of the classification scheme which is one of the fundamental services of the brand. Knollseisen believes the classification and its transparency to the consumer is integral to the brand's success.

Initially the Gallo Rosso organisation started out on a small scale with an office situated at the farmers' union, with a staff of two people. The uptake of the brand has seen this grow to six full time staff who are all employed to increase agritourism in the area. Initially the brand marketed only accommodation, however, in 2005, the offer grew to include 'farm bars', or small family restaurants, and quality products; a range of nine main products all natural to the area. They market what they refer to as the nine main flavours ('sapori') of the region: fruit juices, fruit syrups, jams, dried fruit, distilled wines, vinegars, aromatic herbs, cheeses and eggs (see Attachment 3 for an example of the marketing booklet for these products).

They do not include wine in their quality products marketing, given there is already the DOC quality assurance system – their agenda is to assist the smaller farmers who have no other major method of marketing. Vineyards have other means. Vineyards included in the Gallo Rosso product primarily offer their accommodation rather than their wine production. Most of the vineyards in the area don't actually produce their own wine but rather send grapes to a local cooperative to do so; the cooperative then markets the wines and vineyards cannot be seen to be in competition with these cooperatives.

The Gallo Rosso currently has an offer of:

- 2,506 accommodation locations
- 34 farm bars
- 37 farms offering quality products

The International Experience

Some farms offer all three, whereas some offer two, and the remainder specialise in only one of the offerings.

In developing the brand it was easy to get farmers to accept the initiative and to disseminate information to them given that the Gallo Rosso is part of the farmers' union. The union already had contacts for all registered agritourism operators and the farmers already trusted the union. They contacted all those existing agritourism businesses and now have over 50% of those included in their brochure. Operators pay €330 annually to be represented by Gallo Rosso in their marketing initiatives and to be included in both the brochure and on the internet site.

Knollseisen provided statistics (see Attachment 4) which highlight the significant growth of agritourism since the inception of the Gallo Rosso. In 1999 there were 1,904 agritourism businesses in the Alto Adige, but this grew to 2,506 by the end of 2006. The arrivals have grown from 108,535 in 1999 to 242,439 in 2007, with visitor nights growing from 797,688 to 1,654,097 in the same period. This means from 1999 to 2007 the number of beds offered in agritourisms in the area has grown by 36.5%, the arrivals 123.4%, and the bookings 107.4%.

Knollseisen went on to explain there are two reasons for this growth: on one hand the brand concept contributes and on the other hand it is the quality. He went on to explain that one without the other would not have been successful; the guarantee of quality was important to grow the brand.

The quality is ensured by the rigorous assessment of properties according to the criteria set out by Gallo Rosso; for accommodation providers there are over 90 criteria set (see Attachment 5 for details). The types of accommodation provided are 66.8% apartments, 14.7% room only, 18.5% offering both apartments and rooms. The assessment of these properties takes over two hours, conducted by one of the Gallo Rosso staff. Three main areas are considered – quality of accommodation, of product and of service.

Knollseisen stressed the criteria are assessed rigorously in order to uphold the brand name. This rigorous evaluation process has meant that many of the operators who sought to be part of the group were not included due to inadequate standards. Transparency and quality of product are key to the success of the brand.

The quality control system for accommodation providers designates from one to four flowers to each property after strict inspection. These flowers are clearly displayed outside the agritourism on the bottom of the familiar sign of the Red Rooster.



Right: The familiar Red Rooster sign designates three flowers to this particular agritourism

The International Experience

As with the Veneto there are restrictions on the extension of the farm structures for tourism purposes; farmers wishing to extend their property may do so only up to 250 cubic metres. This limit is noticeably smaller than that set in the Veneto. This limitation on extension, however, is commensurate with the smaller farm size here.

There are 300 farms in the area offering a restaurant service. However, only 40 of these can use the brand name due to the stringent quality controls in place. 60% of the farms offering a restaurant service that approach the brand are rejected as they do not meet the rigorous criteria set by Gallo Rosso.

Gallo Rosso representatives inspect each farm against the following criteria – attention to detail and points of differentiation:

- 1) What is the external situation like – does it appear clean and tidy? What is the farm like, (old/new, etc)? What does the garden look like – is it inviting?
- 2) What is the structure within the farm? What is the quality of the floor/furniture? Is it wood/plastic? What is the cutlery like? The crockery? Are the materials of the curtains etc, linen or synthetic? What standard are the kitchen, bathrooms, toilets, etc?
- 3) The service – what is it like? This includes the products offered by the farms. Do they have their own products eg: jams, bacon, eggs, wine etc. If they claim to have their own bacon then Gallo Rosso counts the pigs, as they want to know if they can sustain their own supply. The whole inspection is built on a point system eg: they get four points for everything they produce themselves, two points if they have pigs and make their own bacon, only one point if they buy the pigs and then make the bacon.

Authenticity of the product is most important. With each criterion operators must reach at least the minimum points, otherwise they cannot go forward. They currently have only 34 restaurants that meet this strict criteria.

The quality products also have their own criteria. There are nine main products which are seen as native to the area: cheese, vinegar, jam, dried fruit, juice, fruit syrups, eggs, aromatic herbs, and distilled wines eg: grappa. The criteria that the providers of these products must meet in order to be listed in the Gallo Rosso brand, is that:

- 1) 75% of the raw material must come from the farm itself. The other 25% may come from another farm, but it must be in the South Tyrol region. In this way the product can be marketed as 100% local region-produced.
- 2) There is a sensory tasting by experts in the food group who conduct blind tastings similar to those used for wine. These tasters prepare a written report on each product, and the product then receives one of three gradings – pass, fail, or pass with improvements to be made.

Only after meeting the criteria is the producer awarded the quality sign – a sign of transparency.

The definition of agritourism that the Gallo Rosso use is:

- It must be a genuine working farm producing products for the market
- The operators must not earn more from tourism than from their agricultural business
- There is a limit of four apartments, or six rooms for accommodation providers.

The International Experience

Farmers tend to protest this limit, saying that there is a high demand for their products, so why can't they have more rooms? However, the Gallo Rosso remains steadfast to this rule as they believe it protects the agricultural businesses in the area and leaves more opportunity for other farmers to start up in tourism.

The Gallo Rosso also conducts periodic surveys of clients in order to ensure quality experiences. One such survey asked for the reasons for enjoying such a holiday.

Respondents said the following:

- 66% selected peaceful environment
- 49% selected connection to farmers and their families
(some parties responded with both answers)

Other reasons cited by respondents were value for money, children-friendly, interested in viticulture, horticulture or animals.

Another survey asked people why they had returned. 66% said that it was because the people were nice, with the next response being that they liked the genuine working farm aspect (statistics were provided verbally by Knollseisen). Knollseisen pointed out that this is the unique selling point of their agritourisms: the farmers and their families, the farms and their products. These two elements ensure the Gallo Rosso agritourisms distinguish themselves from other forms of rural accommodation like small hotels.

The Operators' Perspective – Agriturismo da Sergio

Contact: Sergio Padovan, Agriturismo da Sergio, Via Correr 100, Jesolo (Venezia)

High season rate for a double room is €40 per night (rate of exchange at time of travel 1.63829)



The agricamping site



Padovan and his wife with Corrado Porcaro

Situated about an hour north of Venice at Jesolo di Venezia, just 700 metres from the seaside, is the Agriturismo da Sergio. The farm itself is a corn farm, specifically producing feed for the chicken industry, and also grows a small number of other vegetables suitable for supplying to a small local market. They do not allow guests to work on their farm because of legal ramifications, as workers on farms must be registered, but guests are certainly permitted to tour the working farm.

The International Experience

Padovan explained that they started around 1992 and were the first fully compliant agricamping facility in the area. He went on to explain that it took them three years to acquire all the permissions and permits through their local council, who didn't appear to know much about agritourism at the time. Initially they had many objections from other accommodation providers in the area who feared the new style of competition. He pointed out that these business people were not looking at the big picture; new business generates additional tourists, meaning many benefits for the town and businesses in general. He also added that he believed there is no competition between agritourists and tourists who want hotel accommodation. They are different types of people and one would not necessarily be interested in the types of products used by the other; they are two different types of holidays used by different market groups.

This agritourism offers accommodation in two rooms in the main part of the house, plus two fully self contained apartments and a separate building holding another two self-contained apartments, holding between two to six people. They also offer an agricamping facility; a really interesting and exciting concept for Australia.

The agricamping site has been designed to snugly fit into a corner at the front of the property, surrounded by trees. A main driveway has been laid through the camp site area to lead to the 14 individual powered campsites of 50 square metres each. The agricamping facility is permitted to house up to 35 people at a time. Power is provided to each site by special electricity boxes which were installed at a cost of €400 each, each box servicing four camp sites. Each individual campsite is surrounded by trees which Padovan explained were planted specifically for the privacy of the campers. Each allotment is divided by a series of potted red flowering geraniums, adding to the attractiveness of the property.

Padovan keeps the property exceptionally neat, with well maintained lawns, and a general clean and tidy, fresh summery look. Facilities are provided for campers in the back of their huge barn with outdoor troughs for laundry use, indoor troughs for dishes, and three separate showers for each gender, simply covered by a shower curtain and separated by tiled walls. These facilities were built initially with the government grant they received to start their business, of 12 million lire (approximately AU\$12,000 at that time).



The back of the barn that was converted into a bathroom for the campers. The front section still operates as a barn.

The International Experience

The agricamping facility is only offered during the summer months, while the accommodation is offered all year round. They find they tend to get a lot of business at peak tourist times like Christmas and carnival time when Venice itself has prohibitive prices.

Although the agricamping facility is only open for four months of the year over the summer, some caravan owners leave their caravans on the property either all summer or all year round at a special off season rate; meaning an ongoing income with little outlay.

The agricamping tends to be quite lucrative for the owners who need do little for their guests; there is no bed making, no breakfast making, and generally guests look after themselves, except for when Padovan puts on a *grigliata* (BBQ) evening for all. He explained that this personal contact is one of the advantages for people staying in the agricamping facility. He referred to no 'faceless people', meaning there is individual and personalised contact with all guests. He says guests really appreciate that family-type feeling where they often spend evenings together around a bonfire. The community spirit tends to bring good business through good word of mouth.

The rates in the high season of €11 per day for a caravan, or €9 per day for a tent, plus €6 per person per day (in addition charging for extras such as electricity at €2 per day, or €1.50 per day for a car park), certainly adds to the income of the farmers substantially over the summer months.

One mistake Padovan believes he made when developing the agricamping facilities was to not put timers on the showers. After a long day at the beach some young people spend up to twenty minutes in the shower, pushing water bills up substantially. This is a lesson Australia should take notice of if we are to initiate agricamping, given our water shortage problem. One positive decision they did make however, was to install solar hot water panels, which although initially expensive, have saved water heating bills enormously, supplying enough hot water for about 18-20 people per day.

The rooms in the house itself are simply furnished, but exceptionally clean. The basics are provided: a bed, bedside tables, lamps, bunk beds for children, wardrobe and a mirror. There is nothing interesting about the décor, but at a cost of €40 per double per night the décor is adequate. The fully self contained apartments are well equipped for family holidays by the seaside.

Padovan and his wife run the tourism business in between the running of their farm and over the years have cut back on offerings as their children got older and left home. Being a family of six all together meant that they had plenty of hands when they were running their weekend restaurant, but as the children left home and they themselves got older, they decided to simply offer accommodation with no trimmings, ie breakfast is not offered. They are, however (in Porcaro's opinion), very helpful and pleasant hosts, seeming to enjoy the company of their guests in between their other duties.

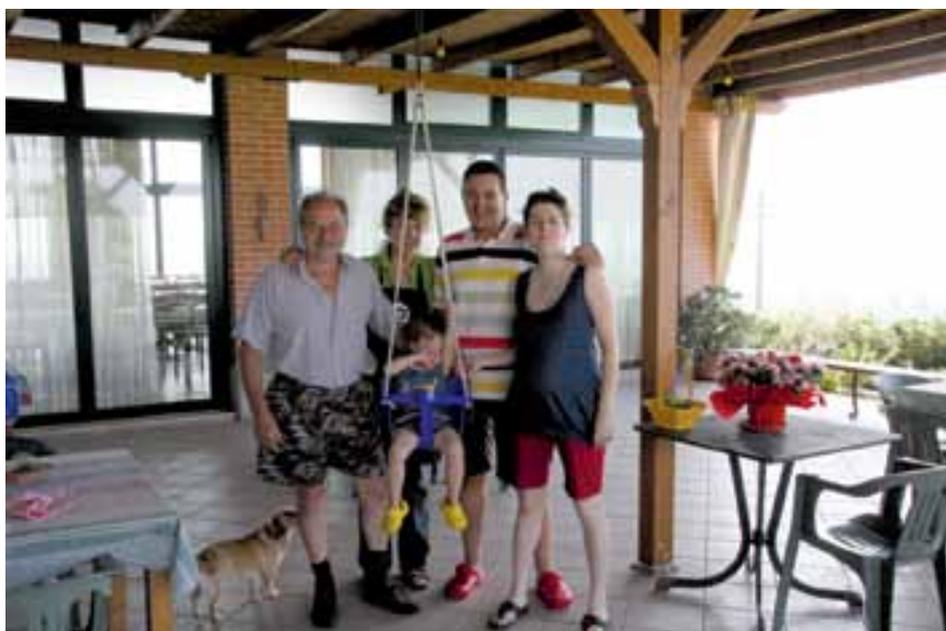
The International Experience

The Operators' Perspective – Agriturismo Le Bianchette

Contact: Lucia Sperotto, Agriturismo Le Bianchette, Custoza

High season rate for a double room is €60 per night.

Situated in Custoza, near Verona, this small village was the centre of historic battles for Italian independence, dating back to the 9th century. The agriturismo is run by a middle-aged couple, Lucia and Dario Sperotto, together with their grown children.



Lucia Sperotto, second from left, pictured with husband, son-in-law, daughter, granddaughter, and the family pet on their outdoor pergola area used for restaurant service or school groups on fine days

Le Bianchette is a six hectare property that produces both Custoza and Bardolino wine grapes. The grapes are sent to the local cooperative to be made into wine. Operating since 1994, they offer four pleasant rooms with their own bathrooms and a breakfast service to guests. The house sits atop a hill overlooking the Verona area and its 'pianura padana' (the largest Italian lowland) with beautiful views in every direction hindered only by electricity pylons and power lines, an unfortunate interruption to the scenery.

The couple have been running the agriturismo business for fifteen years, electing to start the business because of insufficient funds from farming and after hearing about the 'legge quadro' and the government funding for farmers. Initially they started by simply opening a restaurant business on weekends, given that they both worked during the week.

Their motivation for opening the business was that Lucia's part-time job plus the farm income was insufficient for a family of five to live on. Eventually they started to market their 60 seat restaurant (which operates from an extension they built to the house using government funds) as a wedding venue, which at the time had good demand.

The International Experience

Some four years ago they decided to convert part of the family home to include four self-contained rooms available for accommodation. It was explained that the government provide funds for agritourism development every five to ten years. Sometimes the funds are targeted at a specific sector eg: at times it is for restaurants and other times it is for lodging; the decision being based on an analysis of the product available at the time and the perceived product shortages.

Le Bianchette offer the restaurant service only on weekends from March to December and it is a family affair; everyone works, either in the kitchen or front of house. The restaurant does not take 'walk-in' clients, instead working only on previously arranged bookings so they only cook what is needed and offer no more than two choices per course. This eliminates waste and means they only buy exactly what they need for each meal. Their particularly structured approach to the menu ensures it is very efficient and profitable. Dishes are traditional and home made; often with their own produce. They do cater at times for different groups and while the Fellow was in residence, a bus load of wine enthusiasts from Spain were catered for. Five courses were offered with matching local wines at a cost of €15 per person. The restaurant is the major source of income, even though it only opens on weekends. It is fast cash flow given that Italians tend to pay for their meals in cash; as yet they are not a heavy credit card using nation for daily purchases.



The Le Bianchette restaurant, serving only on weekends, is set in an extension to the main house. It was funded by government grants. The restaurant backs onto the family kitchen which has been converted to accommodate industrial sized stoves.

The property was clean and the hosts were friendly and particularly helpful. Some of the features that differentiated this agritourism accommodation from that of small hotels were the lovely little embroidered towels in the bathroom (providing a homely touch, as opposed to the usual white plain hotel towels), the glass of local wine on arrival, and the helpful verbal information of what to do and where to go, together with the genuine interest in the Porcaros and their enjoyment. Additional things like taking the Porcaros to the local car hire company to rent a car, and supplying them with drinks late at night, were much appreciated.

The International Experience

A highlight of the product Le Bianchette offer is the didactic farm. They offer school group tours of the farm at a cost of about €3-5 per child; there is an additional cost if they need to provide a cooked lunch as well. They have designed the didactic farm program together with teachers, ensuring the itineraries, activities and workshops enable the students to familiarise themselves with the rural world. During the tour they introduce the children to their farm animals and explain the food chain, they also explain the grape to wine process, provide the children with a home made farm snack, and allow some time for the children to draw their experience on the farm and complete some worksheets to take home. Additionally, because the area is of historical significance, they present the history of the area to the older students, who witness and hear the story of the Italian war of independence 'in situ'.

This service is marketed through a booklet produced by the Veneto Region on didactic farms (see Attachment 1 for example) and is a popular service for local schools, with many schools booking up to a year in advance; making the following year's reservation before they leave. The service tends to be more popular during spring and autumn (the Italian school system closes for three months over summer). In spring children witness the new life budding out from the plants after the cold of winter, while in autumn they see the ripe fruit and the picking; therefore experiencing the whole life cycle of the grape.



The children's playground at Le Bianchette comes in handy when school groups arrive

Through careful planning and offering a range of quite different products, Le Bianchette has managed to create good cash flow and a profitable business. On weekends they operate the restaurant, Monday to Wednesday they tend to take bookings for the educational farm. and all year round they offer the accommodation. All these elements together demonstrate the many faces of agritourism and how the ingenuity of the operator can design a business that suits each family. This family has also clearly divided the roles, with the men looking after the agricultural business and the women running the tourism business. The Sperotto's youngest daughter is currently studying primary teaching in order to add to the success of the didactic farm.

The International Experience

The Operators' Perspective – Franzin视角 Agritourism

Contact: Frau and Herr Oswald Plunger, Franzin视角 Agritourism, St Pauls

High season rate for a double apartment is €40 per night

Franzin视角 started in 1965 as a small bed and breakfast (B&B) offering a few rooms, owned by the current owner's mother in law. After Frau Plunger married in 1973 she took over the B&B business. For the first fifteen years she continued to run the business as a B&B, however in the late 80s she realised that the existing business was dropping off as people seemed to prefer apartment accommodation instead of B&Bs. Since 1990 the Plungers have been offering the apartments as an agritourism establishment. They have four apartments (the maximum they are allowed under the local laws). One apartment has five beds, two have four beds and one has one double.

A highlight of the property is its beautiful and relaxing garden, with fully equipped BBQ area, tables and chairs, table tennis table, deck chairs, etc. Guests are welcome to help themselves to the fruit and herbs in the garden. The apartments themselves are spotlessly clean, decorated with warm beech wood furniture which is typical of the area. Many of the decorations are from Ikea, a good, inexpensive way of decorating and maintaining a sleek clean look throughout. Guest comfort is considered with small details such as adequate plugs for recharging cameras, phones etc, and excellent reading lights. Unfortunately there is no internet access.



The garden, for guest use



The dining area in one of the apartments



The interior of a studio apartment demonstrating the use of interior wood furnishings required by the Gallo Rosso

The International Experience

The kitchen has utensils, but it could be better equipped; small additions like a large pot and a dish drainer would make it more workable. Another addition needed in the kitchen in order to offer a better service to guests would be to include salt and pepper, small bottles of oil and vinegar and tea and coffee. It is a nuisance for guests who are travelling around to have to buy these necessities for a couple of days. A suggestion may be to offer a small supply kit which could be purchased from the owners if guests come ill prepared. A positive ecological addition is that recycle bins are provided with clear explanations taped on top of the bins using diagrams in order to overcome the language barrier.

A welcome extra, located in the corridor outside the entrance to the apartments, is a bookshelf with a good range of books and a cupboard full of games and cards. A basket full of homemade jams is also placed on this shelf for all to use. Additionally a notice board holds bus timetables, local emergency numbers, local restaurant information and local tour information. Plentiful towels and extra linen are also stored here for easy access for guests. Towels are simply of the home-style variety, in a range of colours (unlike hotels), creating a more homely and a rustic feel.



Shelves in the foyer between the apartments contain fresh jams, fluffy home-style towels, books and games for guest use



A home made clay apartment name sign

Small touches make this place special; each apartment has its own name, demonstrated by small hand made pottery plaques on the front doors. A pretty, rustic, hand-decorated basket holds the brochures of the agritourism at the front doorway. Parking is offered to guests under a shady grapevine for four cars. Franzin视角 is part of the Gallo Rosso group and therefore booking is available online through Gallo Rosso or their own site.

The International Experience

Franzinhof offer their own wine, apple juice, dried apples and a range of jams for their guests to sample and to buy, but they do not sell their products outside of this. Their apples are sent to the local cooperative to go to market, and they are members of the St Paul's Cooperative Cellar (Socci del Cantina di St Pauls). The farm itself is quite small with only three hectares of apples. On request Herr Plunger takes visitors on a complete tour of the farm and explains the workings of it and guests can try the wine in the cellar while lodging here.

In order to remain competitive and for the comfort of their guests, they received funds from both the state and the region to renovate some years back in order to install gas heating throughout, new double glazed windows, and to add roller blinds on the outside of the windows to keep the harsh winters out. The condition of receiving the money, as in other parts of Italy, was that they operate for a further ten years.

The Operators' Perspective – Le Croibe Agritourism

Contacts: Paolo Righetti And Maria-Theresa Pasetto, Le Croibe Agritourism, Verona

High season rate for a double room is €90

This property was passed down through the family after Righetti's grandfather bought the property in 1930. The main production is the cultivation of wine, cherries and a limited amount of olive trees for oil. Six years ago the cellar was extended in order to create a more modern working space for equipment. This liberated the old barn and granary they had been using for this purpose and it was decided to extend the business and incorporate a hospitality space.



Paolo Righetti and Maria-Theresa Pasetto in the Le Croibe communal living area, with their wine and oil cabinet on display in the background. Guests buy these products directly from the operators.

The International Experience

Le Coibe offer a bed and breakfast service with accommodation in four comfortable and tastefully decorated double rooms, electing not to open a restaurant as they believe that would be too onerous. Wine is their main business and they do not want to disturb this.

There is significant attention to detail in this delightful property which offers an exceptional level of comfort to its guests. Rooms include magazines, touches of rustic ornaments, pleasant artwork, a hair dryer, a bar fridge, a TV, reverse cycle air conditioning and plenty of white, fluffy towels.



Bedroom and ensuite

The lounge/dining room contains a library of books with specific literature on the local area and the local wines. Magazines, games, a chessboard, maps and pamphlets are also supplied for visitors' use. Selections of wines and products are available for visitors to try and/or buy. A stereo and a range of CDs to suit many tastes, plus wireless internet access is also made available to guests.

There is a small well-equipped community kitchen servicing the four rooms with plentiful implements and a dishwasher that can be used by guests. The outdoor area, with its views down to the surrounding towns, is well-equipped for guest use, offering a large outdoor setting for eating, umbrellas, deck chairs, sun lounges, cherry trees from which visitors are encouraged to pick the fruit, large pretty pots and decorative flowers; all adding to the restful ambience of Le Croibe.

A fresh and plentiful breakfast is offered as part of the room price, consisting of orange juice, tea and coffee, a range of breads with home made jams from the property, fresh cherries and apricots from the garden, home made apple cake, yoghurt, cereal, a range of cheeses and salamis from the region, all laid out on a breakfast table which is beautifully set using high quality nappery.

The International Experience



The breakfast table, stocked with more than enough for two.

During the Fellows stay, the service and attention to detail offered by the owners was exceptional. In response to a request for a good local restaurant, Pasetto led the way by driving ahead (given that it was a little difficult to find), and then introduced the Porcaros – her guests – to the restaurateur, asking him to ensure a good meal. At night, whilst eating in the garden, they provided everything needed – crockery, cutlery, wine glasses, supplies including olive oil and vinegar, and more than a taste of their delightful Amarone. Attention to detail was carried throughout the property with all signage and the guest book displaying their tasteful logo throughout.

The production of Amarone, a highly acclaimed red wine, is Le Croibe's main business and they offer guests the opportunity of degustation of their products, or an opportunity to purchase the products. Amarone, home made jams, olive oil, mostarda (fruit mustard – a pickled fruit blend typical of the north), are all available for tasting and purchase. The sale of their home made products would be 15-20% of their overall business.

Righetti offers tours of his own vineyard or the cellars in the area, given there are a range of interesting cellars surrounding Le Croibe. Thirty percent of the guests that arrive at Le Croibe have chosen this agritourism because of their wine; given the quality of their Amarone this is not surprising. The wine is not made on the property – as is popular in Italy the grapes are taken to the local wine cooperative where the wine is made. Many farmers in the Veneto Region use these cooperatives to make their wine. This way, smaller producers can simply concentrate on what they know best – the cultivation of the grapes – and the job of actually making the wine is given to the cooperatives who have the equipment, knowledge and the infrastructure to manufacture and market the wines. Smaller producers who would not normally make enough wine for major production are able to contribute to the making of large, nationally sold labels.

The International Experience

Given that Le Croibe is part of the local cooperative, they do not advertise tastings at their property. Official tastings of the Amarone produced in the region can be sampled at the local cooperatives in the town of Negrar. The cooperative advertise these samplings and cellar door sales; growers cannot be seen to be in competition with their cooperatives. Le Croibe do, however, offer tastings to guests or those that simply happen to call in specifically to try their wines, and Righetti is able to sell his own olive oil and cherries, as these are not part of the cooperative.

The Operators' Perspective – Il Croicchio

Contact: Sonia Gonelli, Il Croicchio, Reggello, Florence

High season rate for a double room is €90 per night

Set in Tuscany, near Regello, and an easy driving distance to Florence and Arezzo, is Il Croicchio, which was started by Fabrizio Gonelli in 1986. Gonelli moved to the property in 1977 after he inherited the house, which at the time was in ruins. He had just finished his final year of school, and his father sent him there with a small tractor, to work on the land with a group of workers who had been tending to the land. In those days the workers and their families lived in the farm house in the area that is now used as accommodation and the restaurant of the agritourism.

Gonelli started working immediately as he wanted to use the 5,000 olive trees (some of which were centuries old) and the existing 10-12 hectares of vines as efficiently as possible. Slowly, working hard, and with his great passion for the land and agriculture, he managed to produce excellent wine and oil. He got to the stage where he was selling his wine and oil to almost 60 different restaurants in Florence. At this stage he also had salespeople, who promoted his products throughout the region. He was also an apiarist (he kept bees and made and sold honey), which was more as a sideline as his focus was mainly on wine and oil.

In 1985, when he had reached his peak as far as the production of the farming business was concerned, there was a very harsh winter (-25°C temperature was recorded). This situation lasted for over twenty days and destroyed all but a few of the olives trees. Gonelli had to light small fires under the vines in order to keep them warm, and the boiling water taken to the horses to drink would turn into ice in thirty minutes. They were not equipped for such extreme weather and virtually lost everything. It was at this time Gonelli decided to diversify the business for survival and applied for the government subsidies that were available for farmers to start up agritourism businesses. He was eligible for 28 million lire (roughly AU\$35,000 at that time), and this grant went towards the building of rooms and apartments. They originally started with ten apartments which has since grown to 26. The government grants were very specific; Gonelli could not spend the subsidies towards replacing the olive trees and the vines; he had to use the grant to build the agritourism part of the business.

The business was the second agritourism to start up in the area of Regello, and now there are about 1,000 in this region. This jump in product numbers demonstrates the impact of the government subsidies on the growth of the agritourism sector. The business has flourished to be very successful. In 2008 they served 4,800 customers between the accommodation and the restaurant business. They have four permanent staff in the hotel part of the agritourism from April-October, reducing to two off season. There are other employees in the vineyard and people who provide marketing services for them, and there can be up to 20 people working for them in the busy months.

The International Experience



Three old rooms of the original house now make up the restaurant, which is open to guests and locals



The entrance to Il Crocicchio



The relaxing resort style garden, for guest use



The old entrance foyer of the original house has been converted into a guest bar

The International Experience

Il Crocicchio demonstrates how an agritourism can take on a resort style, with its beautiful venue and delightful views. It is set in the lush hills of Tuscany, completely surrounded by grape vines and olive trees, within a complex built around a renovated elegant Tuscan style country manor. Il Crocicchio also offers all the comforts one expects of a resort: a swimming pool area surrounded by sun lounges, umbrellas, tables and chairs, a children's play area, a bar and a restaurant. The agritourism offerings in Tuscany are quite different to those in the Veneto or the Alto Adige, they can be much larger in size and, therefore, can be quite big businesses, far from the small add-on product one finds in other parts of Italy. But then again, this is Tuscany!

The tastefully decorated rooms and apartments are equipped with a colour TV, a telephone with wake up call service, a wireless internet connection, a safe, bar fridge and a mini bar service. Extra services offered to guests are a poolside food and bar service on request, a laundry service, guides of things to do, maps of the area, and contacts of tour guides. Although there is a communal bar and restaurant area they do lack a communal lounge area which would be important in winter for those guests not staying in the apartments.

Il Crocicchio offer a well-priced list of products for sale and it was noted that these are popular with clients who often buy them simply to take home a souvenir of their stay. They offer extra-virgin olive oil, red and white wine (Vinsanto and Grappa), all made from their own produce. Previously they offered a range of home made food products for sale, but this became cumbersome with changes in 2002 to the European legislation on food, resulting in their food preservation activities being abandoned some years ago.

Other add-on products they have developed over time include a packed lunch service for guests who wish to tour the area, bicycle hire, meeting rooms and a wedding ceremony service. They diversified into weddings some years back as this is a lucrative market, but they are currently not overly promoting this service due to the competing needs of guests requiring a quiet environment to those celebrating. In 2007 they serviced an average of 18-20 weddings, however, in 2008 they had only had 2-3 weddings in-house up until the beginning of June. The decision to cut back on the promotion of weddings highlights the fact that everything that happens on the property must take the guests' needs into account.

The Fellow witnessed the Gonelli's ten year-old daughter's birthday party while staying at Il Crocicchio and noted how she alerted guests of the impending arrival of a large group of children and apologised for the disturbance. Agritourism operators are opening up their home to guests so there is no doubt that their home life is affected.

Outcomes: Summary

The Fellowship journey provided a range of knowledge which will be invaluable in building a successful agritourism industry in Australia. The Italian system is well developed and provides Australia with a trialled and tested product on which we can build and fashion our own particularly Australian version of agritourism. The lessons learned can be grouped under the following headings: location, set up, size, style, mix of the product, quality criteria and control, marketing models and branding, label promotion, training, impacts, acceptance and communication platforms.

The International Experience

Outcomes: The Product

Initial thoughts on agritourism probably lead one to think of staying on a farm and perhaps trying farm products. However, the Italians, with all their flair for creating well designed products and being a nation built on small businesses, have certainly fashioned a broad range of product which goes far beyond the simple room for rent on a farm. Two particular products which stood out from the study trip as being innovative and well adapted to suit the Australian way of life, are the concepts of agricamping and the didactic farm.

Agricamping

The significance of this concept to the Australian way of life is noteworthy. Australians are great campers and this, coupled with the trend towards 'experience tourism' lays the path for an exciting new tourism sector. Tourism Research Australia offers an explanation of the 'Global Experience Seekers' niche market:

"Compared to the average consumer, these individuals spend more and like to engage with the local people and lifestyle. They want to absorb and get involved in the day-to-day culture. Consequently, their holiday experiences are more engaging." (The Global Experience Seeker, Tourism Australia, p.5)

This explanation, coupled with some of the attributes of this group outlined by Tourism Australia, forecasts a market segment who will be interested in this concept due to its ability to provide the personal experiences and contact with locals that they seek; this niche market group is characterised by the following:

- *Seek out and enjoy authentic personal experiences they can discuss with others*
- *Involve themselves in holiday activities, are sociable and enjoy engaging with the locals*
- *Are active in their pursuits and come away having learnt something*
- *Are somewhat adventurous and enjoy a variety of experiences on any single trip*
- *Place high value on contrasting experiences (ie different from their day-to-day lives)* (Ibid, p.3)

The caravan and camping industry has also been highlighted by Tourism Australia as a fast growing market segment:

"The caravan industry is one of the fastest growing tourism sectors, with sales almost trebling in the past 10 years. This market accounts for around 10 per cent of total visitor nights spent by international and domestic visitors. Long term prospects for the industry also look promising, with demand from seniors set to grow." (<http://www.tourism.australia.com/Marketing.asp?lang=EN&sub=0437&al=2543>)

Steady growth for this sector has been predicted: *"the demand for caravan or camping accommodation is expected to continue to grow through to 2020."* (Caravan or Camping Snapshot 2006, Tourism Research Australia, p.2)

Additional figures demonstrate the caravan industry to be quite a lucrative one for Australia:

"There were 8.4 million domestic visitors that stayed in caravan or camping accommodation during 2007, which resulted in a total of 41.8 million visitor nights." (Ibid p.1)

The International Experience

With this expected growth and quite a large industry as suggested by the figures, it will be important to have accommodation growth to meet the demand in particular in country areas:

“Caravan or camping visitors were more likely to visit regional Australia than non-caravan or camping visitors. International caravan or camping visitors spent 45% of nights in regional Australia compared to 19% of nights by other visitors. Domestic caravan or camping visitors spent 85% of their nights outside of capital city regions compared to other visitors who stayed 59% of nights in regional Australia.” (Ibid p.2)

With statistics pointing in the direction of camping growth, it is time for Australia to evaluate the Italian style camping experience.

The agricamping site Porcaro visited demonstrated how lucrative and easy it is to establish and run an agricamping facility. Agriturismo da Sergio's campsite provided the family with year round capital due to some caravan owners leasing their site annually and others leasing a site for the full summer period, given the property is walking distance from the beach. With a modest set-up cost and limited time commitment the agricamping experience is a sensible and viable option for farmers to increase their income and is highly recommended for development and growth in Australia.

The Didactic Farm

The educational farm (commonly referred in Italy as a 'didactic farm'), has become commonplace in some areas in Italy. The Veneto produce a booklet entitled 'Didactic Farms in the Veneto' (see Attachment for 1 an example) specifically to market this specialised product. The Veneto guide to didactic farms in 2006 listed 148 didactic farms dotted throughout the region. The farms listed specialise in different levels of education: kindergarten, primary school, middle school, and high school, with some also offering accommodation on site in either the home or agricamping. Others offer snacks and some offer full lunches. Children may take part in a range of activities including:

- Bread, biscuit or pasta making
- Classification exercises
- Flora and fauna recognition
- Working with specific vegetables eg: degrading and drying corn
- Olive picking and crushing
- Animal feeding and observation
- Jam making, fruit conservation and drying
- Art from nature
- Wine making
- Nature walks
- Flour making
- The honey process
- Vegetable and herb recognition
- Preparing a vegetable plot
- Making candles from bees wax
- Sausage making or cheese making.

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Operators can take courses offered by the Regional Government on how to set up and run a didactic farm, including training in dealing with children and creating activities for groups of children. Once again this is quite a lucrative sideline to the agritourism business, injecting consistent cashflow into the farms with little other than time outlay. The exercise certainly does not require large financial outlay, only needing to provide a small snack for children and a tour of the farm, with the opportunity to feed or touch animals as the basic product.

Farms should ensure they provide space for groups of children to sit while they take part in activities and also need to ensure fencing is adequate for security of the children. In Italy, the government has produced booklets for farmers to use to choose activities for children. One such booklet is titled 'Culture that Nourishes' (see Attachment 6 for an excerpt) and provides outlines of learning activities, the objectives for such activities and the age group for which it is suitable.

Governments in Australia could work together with teachers to design activity sheets for farmers to use with the children who visit their farms. Activity sheets should be developed at the different Victorian Essential Learning Standards (VELS) levels for Victoria and their equivalents in other states. The VELS describe what is essential for Victorian students to achieve from preparatory to year 10. They provide a whole school curriculum planning framework that sets out learning standards for schools to use to plan their teaching and learning programs (<http://vels.vcaa.vic.edu.au/>).

Activities could be developed initially for primary school students to experience the farm, however, some more specialised farms may be able to work with the upper school curriculum and offer programs that are suited to supporting higher level subjects, especially units like 'agriculture' which is offered for example in both the VCE and VET curriculum in Victoria. Perhaps farmers involving themselves at this level may also develop cabin accommodation for teachers to bring study groups to the farms for periods of time during the academic year. These types of activities diversify the farmer's role somewhat, and are an excellent and steady source of income. With appropriate training, supported by government, the agritourism didactic farm can become a viable, realistic and exciting addition to learning in our schools.

Other Product Development Issues

It was evident in the businesses visited that the farmers did not rely on only one source of income. All farms visited offered more than one product. The product mix was generally chosen from accommodation across all standard levels – from simple to deluxe rooms, to agricamping, to apartments, to self contained houses or units, and to resort style. Also offered were a range of restaurant services, product tasting and sales, educational farm tours, or cultural activities.

Some farmers started with one aspect only and eventually developed the add-on products. Some started with a broad range and ultimately cut back the services offered. This seemed to be more prevalent in those businesses that offered a restaurant service who eventually either abandoned the idea due to the amount of work required or cut it back to weekends only which was more lucrative. This is certainly an option for farmers in areas that have heavy weekend drive through traffic where there are greater numbers of people to be fed.

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Some agritourisms did not run restaurant service for outside visitors, but did, however, offer half or full board to their guests due to their remote position. This gave guests the possibility of staying on the farm and not moving away for meals, offering a better all round service to the guests. This method of running a food service is more easily catered for than operating a restaurant for outsiders where numbers are never certain.

Guests who required half or full board were asked to book this service in advance, giving the hosts time to buy and prepare food. Those that did not offer a restaurant service were more likely to provide apartment style accommodation where guests could come prepared and cook for themselves.

Outcomes: Setting up an Agritourism Business

The agritourisms tended to set up their businesses in areas that could sustain tourist interest. Obviously any new tourism product should be assessed under normal tourism prescribed guidelines. The five components generally acknowledged to be important to the tourism product are:

- Destination attraction – what does the actual destination offer?
- Facilities – does the destination have restaurants, retailers, activities etc to hold the interest of visitors?
- Accessibility – is it easy to reach?
- Image – what image does the destination project and to which market?
- Destination price – how much will a holiday cost in this area? Is it an appropriately priced product for the market that it is trying to attract?

In the case of the facilities and the image, it is a bit of a 'chicken or the egg' problem. Obviously if no one starts up any businesses there will not be any facilities, and without people starting businesses there won't be an image. Italy is fortunate that most areas already have an image and there is an abundance of product throughout the country. However, it is important to note that places like Tuscany did not always have the five main components. It was more of a 20th century trend to renovate old farmhouses which were previously left abandoned, and in doing so they created an excellent product image and the required facilities to make the area attractive.

Tuscany is where agritourism began. Sonia Gonelli explained that agritourism in Italy started at the beginning of the 1980s, as a form of rural tourism. The initial form of agritourism was meant as an offer of lodging in exchange for performing small jobs, in a sense, some form of collaboration in relation to the various activities on the farms. Then they started to renovate and embellish the 'case coloniche' (rural houses) and people started buying the 'case,' especially in the Chianti area. The houses were either abandoned or sold by those who had decided to live in the city, thus leaving behind the fertile fields and the many stone houses we now associate with Tuscany.

Some of the houses had been left there for 10 or 20 years before other people, including Germans and the English, began to purchase them. The area of Siena was particularly attractive to those groups of people, who were buying the houses which looked easier to renovate. Some small rural centres began to appear and there was a gradual increase in interest in the area. This has since grown to become an area of worldwide fame that

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currently offers a vast amount of tourism, in particular, agritourism. Gonelli pointed out that one only has to compare the 1998 Official Agritourism Guide of the Tuscan Region (which registered about 2,500 agritourism businesses) to the current number of more than 5,000 agritourisms in Tuscany alone.

The lesson here for Australia is to start the development of agritourism at a regional level, with local governments, small businesses and farmers working together to develop appropriate products to eventually draw tourists into those areas. One could compare the likes of the Yarra Valley, a well established tourism area, with somewhere like King Valley in Victoria who are currently in the process of developing and building awareness of their product. The Wangaratta Regional Tourism Development Inc (WRTD) clearly states:

“WRTD aims to improve tourism facilities in Wangaratta and promote our town as [a] key tourist destination. Our members see the many economic benefits that increased tourism can bring.” (<http://www.wangarattaregionaltourism.org.au/content/view/2/2/>)

By improving facilities such as accommodation, restaurants, and tourism activities, WRTD will help grow tourism in their area. Agritourism can rapidly create the infrastructure required in areas such as this to develop those facilities to meet growing tourism demand. Paolo Righetti provided advice for would be agritourism operators:

“...one must want to invest in the structure, it must be of quality; invest in the rooms, the furniture, the external area, it must be at the level of a hotel but the difference is the presence of the farmers... however...There needs to be other attractions around for the visitors – it must be a package...there needs to be restaurants etc, guests need things to do, especially if the area is isolated.”

He went on to explain that they recently decided to market the fishing in their area in order to diversify and grow their market share. Operators need to look beyond the obvious benefits of a region, like the wine road in Righetti's case, to discover what other features and benefits can be explored.

Style of Agritourism

Given the large majority of agritourism businesses in Italy offer accommodation, one question for prospective operators is what style or form should their intended business take. Something which was made clear by the operators visited was that the product was developed according to the type of market expected in the business.

Frau Plunger made it quite clear that they had to change from their original idea of a simple bed and breakfast arrangement, as people started requesting self-contained apartments. They changed their setup to offer four apartments which differ in size – all but one offers at least four beds to accommodate families, given the agritourism product is particularly attractive to family groups. She added that people are looking for a return to nature. They want natural products and a real rural experience. To meet this market request they offer home made jams and fresh fruits from the garden to their guests. The thing that stood out from the time spent at Franzin视角 was the picking of fresh fruit from the garden, including the biggest, juiciest apricots the Fellow has ever eaten!

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In response to the need for natural products, as already mentioned even the names of the apartments are displayed in quaint hand made pottery signs hanging on the walls outside the apartments; their earthiness reflecting the back to nature feel of the agritourism holiday.

Plunger added that agritourists are looking for the whole experience; they want to meet people and so she believes operators must take on the role with their hearts. Certainly of note to the Fellow was the hospitality of the agritourism hosts; all of the agritourism operators opened their homes and their hearts to their guests. Nothing seemed to be too hard for them; they were always there to lend a hand yet were not intrusive. A display of their hospitality was demonstrated in the 'grigliata', or BBQ evenings where from time to time, or at a guest's request, the farming family would prepare a BBQ feast for guests and spend the evening sharing stories and laughter with their visitors. As the BBQ is also a great Australian institution, this familial gathering with guests would be easily adapted to our own culture. Operators need to make judgments on what form their product will take, according to the types of visitors expected in their regions.

In Italy, the size of the business is dictated by the strict regional regulations, from the 28 beds allowed in Tuscany to the four apartments or six rooms allowed in Alto Adige. The ceiling on the numbers of beds or rooms acts as an excellent sustainable measure, ensuring the farming life is not overly interrupted and that the farm can sustain the extra people without negatively impacting the environment. This also ensures that the additional income is shared amongst the community with room for many farmers to commence agritourism operations and not just a few farming families.

Australia should consider similar measures in order to approach agritourism from a 'triple bottom line' perspective of being economically, socially and environmentally responsible.

Quality Criteria and Control

Sonia Gonelli explained the historical development of the quality control system by explaining Italy has experienced a period of confusion due to each region being independent from the other. For example, at one stage standards were introduced to which businesses had to comply, and those businesses were awarded 'spighe' (wheat sheaths) in a manner similar to the star system we use.

Unfortunately, this was administered at a regional level, not at a national one. This is what Gonelli meant by confusion; each region had its own proposals and applied its own specific legislation. Not all regions complied with the same kind of 'agreement', so there was a situation where an agritourism business in Piedimonte could have three spighe, whereas the same kind of business in Tuscany would only score one or two spighe.

This was a difficult situation; it was especially difficult for guests who travelled between regions, unsure of what the spighe standard actually represented. Then in 1994 legislation was passed so that agritourism operators had to fill in a form and present it to the Local, Provincial and Regional Governments in order to come up with a more uniform classification. For many businesses this was done through the Farmers' Union, who would help its members to fill out the forms.

These bureaucratic steps were often just as confusing. When the 'spighe' were introduced, Gonelli explained they had to classify themselves and had to fill in forms to submit to the government to obtain their classification.

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The aspects that were assessed for classification were items like declaring how many rooms were available. At the time Gonelli had the maximum number of rooms allowed in the Tuscan Region – 28 beds. Other aspects included how many hectares of garden, orchard or cultivations there were, facilities for the disabled, the availability of multilingual staff (Gonelli herself speaks English, German and French), access to a laundry, keeping courtyard animals visible to visitors, a lake with fish on the property and the availability of tennis courts or a fruit orchard. All had to be declared in order to get more points for the 'spighe'. At the time Il Crocicchio achieved 5 spighe, the maximum permitted allocation.

In the meantime other regions and provinces, such as Umbria, Emilia-Romagna, Piedmonte and Le Marche, continued with their own different set of regulations, always keeping in mind, though, certain generic standards.

Approximately five years ago the spighe system was replaced by a star system. The introduction of this system had significant consequences for operators. For example in the case of the Gonelli's, Fabrizio Gonelli would have to enrol in a 200 hour course before being eligible for the highest rating (the business nominee for the agricultural business must undergo the training). Since 2002 the Gonelli's split the business into two parts. Sonia was registered as the restaurant and hospitality business nominee and Fabrizio, her husband, was registered as the agricultural nominee. For bureaucratic reasons the restaurant has a regular commercial licence and the restaurant portion of their agritourism business – building and all – has been 'deruralised', ie it is no longer considered a part of the rural business.

Under the new system Fabrizio would need to do the official training which includes units like marketing, in order to be awarded the three stars. With all their experience, characteristics and standards they are now only eligible for two stars; the third star is out of their reach until the nominee undergoes the course. It is Fabrizio, as the agricultural business nominee, who must do this course. Sonia explained in an interview:

"... he's not going to do it, because, poor man, he is right, it's 30 years that he works in agriculture. We have even put ourselves in the hands of reliable personnel who help us and advise us; agencies. It's true, you don't invent marketing, and you need to study it. This year, for example, my daughter-in-law has undertaken a course, dedicated to marketing in the agritourism sector. Now Fabrizio who has a farmer's (sic) mentality and who is also very busy, with the olive orchard etc is expected to go and listen to a young lad of maybe 25 years of age.... do you understand? He is not going to do it ..." (Interview 18 June, 2008, translated from Italian by Corrado Porcaro).

This situation is obviously difficult, and one that Australia should take into consideration if designing regulations around the classification of agritourism businesses.

Paolo Righetti at Le Croibe reported the situation from the point of view of the Veneto regulations. There is the possibility to have a classification (up to five spighe), but this is not obligatory. Operators choose if they want to do it. He has decided not to seek classification as there is too much work in terms of marketing and communicating what the standards are. For this reason they have opted out. These standards are a mode of communicating something about the quality of the property, but operators then have to go out and market the meaning of that quality standard. It is obvious from these problems that there needs to be national standards created that give operators and clients clear indications of what the standards actually signify.

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Frau Plunger gave a brief explanation from the operator's perspective on how the Gallo Rosso standards were allocated. She explained that they came to check on the standard of their property early in 2008; she was advised she would retain her 'three flowers' rating, but if she wanted to achieve 'four flowers' she must have a lounge/eating space for the guests where they can gather as a group. She did not see the need for this, given guests had their own lounge spaces in their apartments and there was the provision of an outdoor gathering space around the BBQ area.

Plunger explained that in order for Franzin视角 to initially receive their 'three flowers', the apartments' furnishings had to be made of wood and all the curtains of linen; all materials had to be deemed 'natural'. She went on to say that the inspections from the Gallo Rosso do not appear regularly. They have only been to check up twice since she originally joined the Gallo Rosso group.

Marketing Models/Branding and Label Promotion

The Target Market

Target markets for the agritourism product, according to the operators, are quite varied, with no one absolute age or demographic group. Many young couples seem to be important for the weekend market. Families with young children, in particular for properties with animals, frequent on both weekends and for longer periods of time during the holidays. Baby boomers looking for a getaway from family and work are also regular visitors. International tourists are an important market, with the experienced seekers looking for a holiday with a difference.

Righetti noted that Le Croibe's target market changes with the seasons. From October to March they work primarily on the weekends; clients being predominately young Italian couples, aged from 20-30 years of age. A third of their clients, from April to September are foreigners, though he noted that in 2008 there were not so many (this was the period of the European Football Cup which could have affected arrivals in June). The next most common age group is from 45-60 years, with many international arrivals from the central European countries including Swiss and Germans as well as Scandinavians and some Americans.

Plunger advised most of Franzin视角's bookings, in fact around 70%, are either return bookings or from word of mouth marketing. She believes that people like this type of holiday so return frequently. She went on to explain that 90% of her market comes from Germany; given their proximity to Germany this is understandable. However, this area also borders with Austria so one would have expected this group would make up more than 2% of their arrivals. The rest of their market is made up of about 5% from Italy and they have now noticed a new emerging market from Holland. Their business attracts mainly couples and some families, but it was noted that families prefer more rural locations in the countryside. Although Franzin视角 has a working apple farm, it is situated in the main street of St Paul's rather than in a totally rural position.

Families are certainly the target market for Sergio Padovan's agricamping at Agriturismo da Sergio. Padovan explained there was no prevailing nationality. Initially he explained they had lots of groups of young people, but they now favour bookings from families given that large groups of young people tend to make a lot of noise; he explained families are much quieter. Families too tended to book the camping space for the whole summer period which was easier for them to administer and provided a secure income.

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Lucia Sperotto at Agriturismo Le Bianchette advised her market for the rooms is 50% foreigners and 50% Italians. The restaurant is more popular with locally based clientele, except for occasional large groups eg: the World Convention of Wine and Grapes, organised by the EU, who were in residence at the same time as the Fellow.

Sonia Gonelli advised their main market has changed substantially over time, having been heavily affected by outside influences, originally Belgians, Germans and the English. These were lucrative given they tended to opt for longer stays with a minimum of a week, if not two or three. That has now changed and the majority of her clientele are Americans, in particular tour groups, with Italians generally staying on weekends.

Il Crocicchio redirected their marketing towards attracting the local Italian market after being heavily affected by world events; the September 11th 2001 attacks in the US, and more recently the US economic crisis. This together with a run of bad weather in 2008 with substantial rain has meant many cancellations. Gonelli believes it is important for operators to target a diversified market in order to combat these fluctuations and sees the local market as important for cash flow. Regarding age of clients, there is quite a broad mixture in their clients. Interestingly she sees many of the local Italians who stay for weekends are in the 22-25 year old bracket.

It appears we cannot box the agritourist into broad descriptors as all operators mentioned the diversity of their markets. It is also important for Australia to note the influence of the German and Dutch markets who appear to enjoy this form of holiday. Given the German market is a growing market in Australia it is worth considering agritourism as a draw card for this group in target marketing. Germans are adventurous travellers and present a strong and relevant market to us here in Australia. This market continues to grow, according to Tourism Australia:

"There were 11,600 visitors from Germany during August 2008 bringing the total for the eight months to August 2008 to 100,200, an increase of 7 per cent relative to the same period of the previous year." (<http://www.tourism.australia.com/Research.asp?sub=0318&al=3011> downloaded 19/10/08)

Tourism Australia have carried out extensive market research of the German market and have completed a survey of the niche market groups who present the greatest potential for Australia. This data can be found in their publication 'The German Traveller – Segmentation of the German Market' (http://www.tourism.australia.com/content/Research/Market%20Segmentations/Germany_Segmentation_Study.pdf)

"Of the five segments identified in the German travel market, 'Self-Challengers' and 'Comfort and Learning' are the segments specific to the German market that Tourism Australia has identified as core targets." (Ibid p.16) *"The self-challengers make up 12% of their long haul market of 1.8 million long haul travellers."* (Ibid p.6)

The 'self-challengers' group can be identified as important to agritourism and agricamping in Australia because they *"are likely to stay with friends or in budget accommodation (including budget hotel/motels, youth hostels, B&B's and camping."* (Ibid p.7)

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Tourism Australia has also identified the types of activities the self-challengers prefer; these too are very relevant to the agritourism product:

“Once at the destination, self-challengers are more likely to:

- *Get to know locals*
- *Explore the backstreets*
- *Self drive around and beyond the city centre*
- *Explore the natural surroundings and local wildlife*
- *Explore the countryside*

Self-challengers also like to try local cuisine, purchase locally produced products and experience cultural and indigenous activities.” (Ibid)

Agritourists certainly share a broad range of age groups and demographic backgrounds. Obviously the end product offered will appeal to different demographic groups so it is important for farmers, when developing their product, to have a clear understanding of which market groups may enjoy the style of product they are offering. However, it is just as important to keep an open mind on where and how broadly they may be able to seek their customers.

Marketing

Undoubtedly, from the operators' perspective, the internet is the greatest source of bookings by far. A good website is imperative, and connections with well placed internet marketing companies are integral to the success of the business. Although this is true, Sergio Padovan does not own a computer and does not have (nor is he able to use) the internet. Padovan publicises his agricamping facility in the 'Turismo Verde' (Green Tourism) guide which is published by the Confederazione Italiana Agricoltori (Italian Farmers' Confederation). This guide also has an internet presence which obviously leads to spin off business for them, but it cannot be booked online. Padovan explained that they sometimes get questions from the internet, but these are directed through his sister-in-law, who phones them through to him. This situation is not optimal, but it appears to work in this small community.

Paolo Righetti explained that the internet marketing companies were fundamental to Le Croibe's success. They are members of Terranostra (www.terranostra.it), and the Valpolicella Strada di Vino – 'Wine Road' (www.valpolicella.it) websites, and 70% of their guests come from the internet, either from these agritourism marketing company websites or their own site. The other 30% of their business is gained through word of mouth and repeat business. In Righetti's case they are not only marketing through agritourism marketing groups, but also through specific interest marketing sites like the 'Wine Road' site. Agritourism operators must consider carefully relevant marketing connections available to them.

Righetti expressed some concern about search engine optimisation. He would like to see the Regional Government tourism bodies, who currently spend a lot of money in data collection, redirect funds to increase the profile of the region in a more prominent position on the internet search engine responses. The first few pages of responses when searching Google eg: 'the Valpolicella region', are all private sites. He believes this should be a government priority to ensure the government sites come up first and foremost, and Local Government should position the region for what it has to offer, after which people can then search for private businesses. He believes there are too many government sites: each area site, each region site, the 'Wine Road' site, etc, and that funds would be better spent on one major site, amalgamating all the smaller sites and covering all aspects of the region.

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Lucia Sperotto markets primarily via the internet, on www.agriturismo.it, which accounts for 80% of their bookings. She went on to explain that signage is also vital to the marketing process. Councils are responsible for this and the type of sign provided is decided upon according to where the sign is exposed; a council road or a provincial road. Operators pay the reasonable sum of €13.44 per year to have their signs displayed by the roadside. Consistent signage is used throughout Italy for agritourisms, with the word agriturismo displayed first and foremost and then the name of the business. These signs can be seen all over rural Italy, ensuring a consistent concept of agritourism is constantly marketed.



A typical road sign for agritourisms. Source: <http://www.agriturismoronco.it/images/cartello2.jpg>

Frau Plunger explained that Franzinhof started marketing through the Gallo Rosso brand when the group started in 1999. This gave them a presence on the internet and in a brochure. In real terms she believes the difference in bookings is probably only about 15%. However in that time many more people have started agritourism in the area due to the government support for start up, so it is difficult to gauge the actual increase.

Franzinhof also receive about 15% of their bookings through the local tourism office in Appiano. This office is particularly efficient in that they update a register of available accommodation every two days and direct visitors to accommodation in the region. There is a great deal of cooperation amongst local operators; should they be fully booked they recommend other Gallo Rosso accommodation in the area.

Sonia Gonelli explained that they prefer not to work with big agencies who charge very high commissions, so they decided to invest quite heavily in their own internet marketing. Their first internet site was designed in 1995-1996 and has been continually developed to the present, professional looking site. In 2008 they invested around €5,000 in search engine optimisation; at the time of the Fellowship trip they were in their fourth month of this campaign and notice they were edging their way to the top of the page hits. They have linked with a number of sites like www.lastminute.com and www.tuscanescapes.com; these too have brought new business.

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In addition to internet marketing, the Gonelli's do work with some agencies and of late with some tour companies directly. With their largest overseas market now being the Americans they liaise closely with 'Europe Through the Back Door', 'Rick Steve's Tours' and a small private bike touring company. They can take two groups at a time given the size of their property. Tour groups looking for something different stay at Il Crocicchio for a relaxing respite from the stress of touring.

All of this is a far cry from Il Crocicchio's original marketing methods where the business really got its kickstart from word-of-mouth.

The Gallo Rosso Marketing Methods

Dr Hannes Knollseisen explained that the Gallo Rosso use a broad range of different marketing avenues depending on the particular target market. There are 90,000 catalogues printed annually which gives some idea of the demand for the agritourism product. They advertise in newspapers in Germany, given this is one of their biggest markets. For the Italian market they tend to attend travel fairs, which proves to be successful. Direct request from the internet site is their major source of bookings and enquiries, and in the south Tyrol region they use radio advertising.

In order to ensure a professional marketing campaign they use four main PR agencies to do their marketing for them. The agencies are located in Parma for the Italian market, Germany for their major international market (55% of the total) and the Austrian and Swiss markets combined. In order to source new markets they have recently contracted agencies in Belgium and the Netherlands and their advertising has resulted in a substantial response. Additionally, they use internal marketing within Italy in order to strengthen the product, which should in turn increase business. Newsletters are forwarded regularly to operators with articles around product development and quality.



*The recognisable Gallo Rosso label with its red rooster in pride of place in the central position.
Source: Dr Hannes Knollseisen*

All agritourisms in their group use the Gallo Rosso brand name in all marketing. Gallo Rosso provides the branding and merchandising regulations including strict controls on where the logo must be placed and how it is used, to ensure uniformity and recognition. Gallo Rosso have chosen the position of the logo placement in an area they believe is easy to communicate eg: on jams and dried fruit the familiar sign of the red rooster sits in a central position on all labels.

Associations

There are different categories of agritourism groups and associations. Paolo Righetti from Le Croibe is a member of a range of associations who appear to be more useful from a bureaucratic level rather than a marketing level (from his point of view). He explains the term agritourism is fluid depending on areas and, therefore, it is difficult for national associations to develop a common theme. There is a wide range of price difference and standards between these businesses. He firmly believes there is a need to have set standards so the market understands what they are getting.

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Righetti, like other operators, believes that any collaboration is more effective between friends in local areas than with an organised group. Most operators feel this way except for those under the Gallo Rosso brand who tend to prefer to work with operators from the same brand. Certainly the one thing of note in Italy is a lack of strong associations (apart from the Gallo Rosso brand). Operators tend to work in their local communities with friends rather than with a strong association behind them. Those under the Gallo Rosso have regular communication with other operators and regular communication from the Gallo Rosso through emails and newsletters.

On the other hand, Sergio Padovan cited the Italian Farmers' Confederation as important to their business, offering training and marketing options. It is interesting to note the major role that farmers' groups seem to take in Italy – rather than simply act as traditional tourism marketing companies, both the Farmers' Confederation and the Farmers' Union in Alto Adige take an important role in the development of agritourism.

Training

All agritourism operators must undergo training before a permit is issued to start the business. The basic training for anyone wishing to establish a new operation is 100-200 hours depending on the region. This includes topics such as the concept and philosophy of agritourism, hygiene and safety, communication skills (including some basic internet technology), and some marketing. There are education providers scattered within the regions who offer the various courses for operators. Renato Francescon from the Veneto Region, explained that these providers must be accredited by the region to offer the courses and information on these providers can be found on the region's website. Additional courses are offered throughout the year which operators can elect to do according to their own needs and interests.

Paolo Righetti explained that the Terranostra marketing group also assists operators in marketing by running courses for them. These courses can be part of the obligatory 150 hours required in the Veneto before commencement in an agritourism business. Additionally, the region introduced an excellent course in 2007 in professional marketing. The course was run by an outside marketing group who were experts in their field and Righetti found this extremely advantageous. He went on to explain that some of the training offered to agritourism operators did not address the concept of marketing well, because they often tend to deal with farmers who have limited education, so they can tend to 'dumb down' the courses on offer. With this in mind, one recommendation for training of operators could be to have different levels, from beginners to advanced levels.

Frau Plunger from Franzin视角 in the northern region of the Alto Adige also referred to the training offered under the auspice of the Gallo Rosso brand. Apart from the formal training, the Gallo Rosso emails and periodic newsletters have articles covering topics which assist in business growth. Plunger explained she had done some courses through the Gallo Rosso, but explained that sometimes the courses may not meet operator needs. This may be related to the level of the course being offered eg: beginner or advanced, or the content inappropriate to the interest, or time required to undertake the course. One course she did undertake through the Gallo Rosso which she saw as advantageous was internet training.

To ensure the specific requirements of operators are being met, there needs to be a high level of communication between operators, course developers and trainers.

The International Experience

Before commencing her business, Lucia Sperotto undertook a course of 210 hours on managing an accommodation and restaurant service. Subjects included hospitality, bookkeeping, cooking, general knowledge of legislation, and hygiene. She specifically highlighted the hygiene course she did, pointing out that after having completed the course she is now responsible for all the issues related to hygiene throughout the business (this is similar to the equivalent Hygiene for Food Handlers Certificate used in Australia with equivalent responsibility). She also mentioned that waiters need to do a hygiene course of four hours in duration, with the course certification valid for two years only. A certificate is issued to each employee handling food and if they are found without a valid certificate the business is closed down for fifteen days.

The courses are run both at night and during the day, with older farmers tending to choose the night time option, probably due to farming commitments, while younger farmers tended to study during the day.

Sperotto advised the funding for farmers who wish to start an agritourism was preferenced towards younger people who were awarded more points in their application. Younger people receive additional points and there is a sliding scale according to age. No funding is available at all from government for farmers over 50; the government is looking for long term commitment in order to boost the industry. The original course Sperotto undertook was subsequently followed by a 120 hour course designed specifically for running a didactic farm. The course included some basic business units as well as specific education related units with booklets provided on how to set up entertainment and lessons for children.

Dr Hannes Knolseissen from the Gallo Rosso explained their training is organised through the Farmers' Union, with one whole department working just on educational programs. These are offered throughout the year and throughout the region. There is an in-depth brochure produced on training by the Farmers' Union every year with a significant section on tourism. Other types of training offered to farmers includes legal knowledge, entrepreneurial skills, energy/conservation, health and hygiene and accident prevention. They must do a package of at least 100 hours initially with a range of different modules eg: micro-marketing, how to run the business, or communication through email.

The site for these courses is found at <http://www.sbb.it/de/weiterbildung/index.asp>. Here one can find a vast range of courses in a 72 page document devoted to training priced between €10 and €125 per course for the farmer. The training is very well resourced and they tend to employ the services of special guest teachers according to specific topics, sourced from throughout Europe. This training is supported by the EU Social Fund, emphasising the importance that the training be supported in order to make it affordable for farmers.

Impacts of Running an Agritourism

All the operators interviewed were unanimous in their support for starting up an agritourism business. They all referred to the importance of the tourism business to their financial viability. They all believed their agricultural businesses alone did not provide adequate financial return.

In all but one case, it was noted that the husband ran the agricultural business and the wife ran the tourism business. They all saw this clear division of labour as important to ensuring that both businesses ran smoothly. In addition, other family members (usually grown children) were allocated specific operational tasks.

The International Experience

In the case of Righetti, he seemed to put a substantial amount of time into the tourism business operations. This could be because he had teenage children and his partner seemed heavily involved with the children and their activities. He explained that the business takes up a significant amount of time: *"You have to have the time to give to the guests! They are looking for a more personalised service than what they would get in a hotel, they make this choice consciously."*

Righetti ensures he gives guests the time required. This clearly takes time away from the agricultural business where at times he explained he had to leave his farming work to see to guests' needs. Even in the vendemmia (grape picking period) he has to leave the business to his co-workers in order to assist the guests. He admitted the tourism business takes up quite a bit of his time, but he does not see this as negative, seeming to enjoy his role in explaining wine making with his guests. He believes his guests take home a special memory of the Valpolicella region, as they sometimes accompany him to the vendemmia, and he sees this as an important lesson for his visitors. He believes that guests seeing the Amarone being hand picked will turn into exponents of the wine of the region, in turn helping to promote the region. Righetti wisely sees everything connected to the business as a marketing opportunity.

Frau Plunger could only see the positive side of agritourism, referring to the years when the raccolta (the picking period) is low and the fact that they have the agritourism to boost their income. She explained they see their agritourism venture as a positive step for them. She can run the whole business on her own, meaning all income goes straight to the family budget. Only on occasion when it is very busy does she call on a local woman to assist her. Her husband manages the agricultural business, but she helps him at picking time. If they want to go on holiday they go away in winter when there are no bookings, because people only tend to come to their area outside of the cold winter season.

Sperotto explained it is a 24/7 business and although it entails sacrifices it is a rewarding family business and is an excellent supplement to farm income. She warns future operators to start with some humility, grow the business slowly and do not expect overnight riches.

Sergio Padovan believes the job is easier with a family. As their children grew older it meant there were always plenty of hands to help with the tourism business and also to help with the agricultural business. When their grown up children left home they had to scale down the business in order to cope with the demands of running the two businesses. Because of this they closed their restaurant, even though it was only a weekend activity, in order to fit in with their work on the land.

Like any family run business, family members need to set their objectives for the business and analyse their family needs and the time required on their individual farms; each agritourism will reflect those needs and family commitments and should be designed accordingly.

Advice to Prospective Operators

Dr Hannes Knollseissen from the Gallo Rosso offered some advice for the growth of agritourism in Australia, based on his experiences in developing the Gallo Rosso brand. Obviously, he pointed out that Australia will have a different structure which will need to be developed to suit the Australian conditions. One of the most important considerations is to concentrate on the product and to develop an excellent product with consistency of quality.

The International Experience

Using consistent brand quality criteria will ensure consumers know what they are getting. It is advantageous for agritourism to develop under an umbrella label; developing a label helps to promote the product.

Another particularly important aspect to ensure success is authenticity of experience. Agritourists are looking for a real farm experience; they should feel confident they can get this. Australia should carry out a comprehensive survey to determine what the market wants and we must carefully define the target group. Knollseissen suggests starting with the domestic market and then ensure there is knowledge transfer to other markets; one will necessarily follow the other once we have a good, authentic product. The price needs to be set according to world wide pricing. Agritourism in Italy is a particularly well priced product making it very suitable to family budgets.

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The Italian agritourism product is a well crafted and well known product throughout Europe. The word agritourism is well understood and when it is mentioned people have a clear picture of the type of holiday one is talking about. In fact many people refer to taking an 'agritourism holiday' In Australia the simple word agritourism is still met with "what is that?" This is the first clear message for Australia; we need to ensure the word itself is understood and immediately recognisable and that the concept of agritourism is a familiar one. Until we do this we cannot develop the product.

Although we currently have a well established farm tourism industry, we need to use the same terminology that is used throughout the rest of the world. Subsequently the labelling of the current farm tourism product under the heading of agritourism will give it a globally recognised title, if those current businesses fit the elected criteria for doing so. We then need to establish a strong brand label for our product and ensure the product offered is of consistently high quality, which is essential to maintaining global survival.

Agritourism can be a globally successful Australian product. The following recommendations for specific activities are made as result of the learning of this Fellowship journey.

Government Support for the Growth of Agritourism

The very first step for our government is to do as they have done in Italy, ie establish our own formal definition of agritourism. This will be important if government heeds the recommendations in this report (see 'Recommendations' chapter) to set funding aside for farmers to develop agritourism on their properties. The definition must clearly state the difference between rural properties that run tourism businesses like bed and breakfasts and actual farms that support their farming businesses through some form of tourism. It is these businesses that require government support in order to assist in keeping farmers on the land in an increasingly difficult environment. The Italian definition that clearly states agritourism activities "*remain connected and complementary to farming activities*" should be seriously considered if we are to support the agricultural industry in this country.

Government must also clearly define its objectives for developing agritourism and clearly the Italian objective of halting out-migration of farmers from the land could be echoed here. Government should revisit policies on supporting farming communities, especially those experiencing difficulty, and should consider what agritourism can offer. The Australian Government's Farm Help program (which has recently been abandoned to make way for Australia's Farming Future initiative), including the Transitional Income Support Program, may be an avenue to access funds for agritourism development. The website explains how the new program works:

"...[the Program] ... provides assistance to set goals and develop an action plan to improve families' long term financial security, either within or outside of agriculture. Rural Financial Counsellors can assist eligible farmers in making their decisions and taking action to improve their financial situation.

An Advice and Training Grant is available under the Climate Change Adjustment Program for specialised professional advice (where the advice is linked to managing the impacts of climate change) and training across a range of areas to help farmers adjust to the impacts of climate change. Examples of professional advice could include business planning and

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management, technical advice, financial assessment and in some instances legal and personal advice. Examples of training include climate risk assessment, weather monitoring and skills that may provide off-farm employment."

(http://www.daff.gov.au/climatechange/australias-farming-future/climate-change-adjustment-assistance/transitional_income_support)

This new farming initiative could easily accommodate agritourism development with farmers receiving assistance in business planning and training; the document also recommends financial assistance for eligible farmers. Funding in Italy was used by farmers to undertake initiatives such as to renovate their houses with ensuites, build extensions, or to build concrete driveways and outdoor bathroom blocks for agricampers; in effect turning their farms into 'product ready' for the tourist marketplace.

An Italian law was passed in the mid 80s to define agritourism, after which government began financing these operations. Statistics acquired from Dr Hannes Knollseisen (see Attachment 4) demonstrate how dramatic that growth was just in the Alto Adige region. There were 33 agritourisms in the Alto Adige in 1989. Within five years this became 1,114, in the next five years it became 1,904, and the next five years 2,328, with 2,506 at last count at the end of 2006. This dramatic growth must be attributed in part to the funding made available from government sources.

If Australia was to offer this type of support, new farming communities reliant on tourism could develop, as happened in Italy; an attractive alternative rather than simply supporting farmers to re-establish in other forms of work. We need to build a new pride in farming communities, one where we do not 'throw out the baby with the bath water' so to speak, but rather where we allow farmers to stay on the land, doing what they know best, yet support them financially through government assistance and the growth of tourism, subsequently establishing a new pride in their communities and the economic development of rural areas. We know this can work; it is working throughout Europe, and although they have a different history with a different culture, a farm is a farm. Agriculture and its importance to every community does not change. Having to support that agriculture through government assistance does not change; we must learn from the Europeans who have a much longer history of farming than we do. It is imperative that a relatively new country like ours learns from those who have survived the test of time.

Supporting farmers' livelihoods is one thing, but the spin-off effect of building tourism to the regions should also be considered at the policy level due to its importance in building the financial success and economic viability of rural areas. As Tourism Victoria identifies:

"Tourism is a major economic driver for regional Victoria. In 2003-04 tourism contributed \$3.4 billion to regional Victoria and accounted for 61,000 jobs." (Regional Tourism Action Plan 2008-11 p.3)

The Regional Tourism Action Plan by Tourism Victoria and its relevant equivalent in other states should include the concept of agritourism as a method of meeting the infrastructure demands to draw consumers to the regional areas. It was made quite clear by Greg Hywood, CEO, Tourism Victoria at their 2008 'Marketing Masterclas', that we need a stronger, more coordinated regional structure in order to entice people into the regions and have them stay longer. Coordinated approaches to agritourism can assist with this.

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Government must demonstrate through its policies the importance of supporting, not only the marketing of tourism, but funding its development at a rural level by backing farmers to develop agritourism. Large infrastructure development appears to be on the government agenda but sponsoring smaller product development programs like funding farmers to build infrastructure in regional areas to increase tourism appears to be omitted. According to Tourism Victoria:

"The current regional marketing program does not provide funding for activities beyond marketing such as product development." (Ibid p.12)

It is evident there is a synergy between the government tourism bodies and the Australian Department of Agriculture, Fisheries and Forestry and a holistic plan should be developed.

Government should acknowledge the potential of agritourism to draw visitors into rural areas and its ability to quickly and easily add to the tourism product: adding to the accommodation supply, food and beverage experiences, and activities for visitors. The development of agritourism will draw both domestic and international visitors into rural areas. The importance of international tourism into rural areas should not be underestimated:

"While domestic visitation is forecast to remain flat in the forthcoming years, international tourism is predicted to grow significantly and offers strong potential for some regions, particularly those close to Melbourne. To maximise the economic benefits of international visitation to the State, key regions will need to increase their focus on international marketing, particularly for high yield segments..."

The regional dispersal challenge is exacerbated by the fact that many of Victoria's regions have a limited range of products, shortages of high quality accommodation and supporting infrastructure needed to attract key international segments, entice them to stay beyond a daytrip, or travel further than a short radius outside of Melbourne." (Ibid)

Given Victoria's strengths in food and wine, it is important that both the Federal and State Governments support the growth of that niche market by assisting in the provision of adequate rural accommodation through the development of agritourism. The sector's strengths have been documented by Tourism Victoria:

"According to the latest results from the Brand Health Survey, Victoria leads other states as a destination for consumers to experience quality food and wine, touring by car, events, shopping and theatre." (Ibid p.13)

Touring by car requires a range of accommodation dotted around the countryside that are accessible by car; agritourism can assist in meeting this demand. Adding to this recommendation would be that this accommodation supply should be well sign posted with easily recognisable agritourism signage; the government needs to build agritourism signposting into their touring sign-posting policy.

Market the Agritourism Label

Tourism Australia, Tourism Victoria and other state government tourism bodies must actively participate in profiling agritourism in Australia. They have commenced this process by mentioning the term in their future tourism planning documents, but they must now write specific plans dedicated to the development of the agritourism sector. The development of the sector should also be holistic and should be highlighted in government's (National, State, and Local) future economic, agricultural, and tourism planning processes.

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Methods of marketing tourism must specifically trumpet the agritourism product. Currently internet exploration of the word 'agritourism' leaves the searcher empty handed. Tourism Australia includes agritourism as a product in the niche market segment on their industry site, however, a current search for 'agritourism' products on the international marketing site (<http://www.australia.com/>) returns a zero response (3rd October 2008) while the term 'farm holiday' produces 3,080 responses.

It may be argued that we should want our own unique 'farm tourism' product, but the popularity of the term agritourism in Europe and North American markets (markets we wish to tap into for the growth of tourism into the regions) means that we must adapt to their terminology. If we are to be internationally competitive, we must use international tourism terminology. A similar search on Tourism Victoria's website (<http://www.visitvictoria.com>) produced no results (3rd October 2008) whereas the word 'farm' produced 337 results.

Internet presence of the agritourism sector in Australia is vital to its long-term growth as highlighted by Tourism Victoria in the Regional Action Plan:

"To achieve growth in both domestic and international visitation, it is critical that the regional tourism industry in Victoria is well positioned to take advantage of the internet as it grows in significance as an avenue to influence consumer choice. Indicators show that around 60 per cent of international visitors to Victoria use the internet to research the destination prior to their visit and a further 30 per cent book at least one component of the trip online.

However, many tourism operators in regional Victoria do not use online booking systems and risk missing out on business as consumers move toward online booking of tourism products and services. Although more than 90 per cent of operators listed on [visitvictoria.com](http://www.visitvictoria.com) have websites, less than 16 per cent of operators have online booking facilities." (Ibid)

Specific online agritourism booking services need to be developed in order to encourage the growth of this important rural tourism product.

Once this important presence is seen in national and state marketing materials it will also be imperative for industry to build awareness of brands of agritourism throughout the country. Local areas like the Yarra Valley in Victoria or King Island to the North of Tasmania should brand their agritourism products in the way the Gallo Rosso has done. Putting accommodation, farm bars or restaurants and farm produce under one label and marketing them as an holistic entity, will increase bookings and sales to each region. There are many other regions throughout the nation that could also follow this principle. Gallo Rosso has demonstrated how an area with low visitor nights has been able to turn that around to be a successful tourism region built on its agritourism product.

Expected growth in tourism arrivals into Australia will mean we need to grow tourism infrastructure at a considerable pace:

"The number of arrivals to Australia is forecast to increase at an average annual rate of 4.4% a year between 2007 and 2017, to reach 8.7 million, compared with annual average growth rate of 2.7% between 1997 and 2007... Substantial investment in the accommodation and other tourism related sectors will be required to meet this demand from the expanding inbound sector.

The 4.4% average annual growth in international visitor arrivals over the forecast period, 2007 to 2017, translates to a cumulative extra 19.6 million arrivals over the next decade... Considerable investment in tourism supply capacity (such as in the accommodation and aviation sectors) will be required to meet this demand." (Forecast, issue 1 2008, Tourism Forecasting Committee p.8, <http://www.tra.australia.com/forecasts.asp?sub=0090>)

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The aftermath of marketing opportunities like Baz Luhrmann's 'Australia' movie may mean this influx in tourism could see an increase of tourists interested in rural tourism to Australia. This anticipated growth equals a need for product development in rural areas and with this in mind we should have two main goals: to build the number of agritourism products available; and to market the concept of agritourism as an economically viable addition to farming in rural communities and educate rural communities on their role in this expected area of substantial growth.

Educate Farmers:

1) On Types of Products They Could Offer; 2) On Running a Tourism Business

The successful Italian agritourism model is based on a clear government direction and support for education in the sector. Any farmer wishing to start an agritourism business must undergo a minimum period of training, the least of which must equate to 120 hours. The Italian Government clearly recognises the equation of successful tourism with well trained suppliers. Australia (particularly Victoria) also recognises this importance:

"Skilled labour is critical to the delivery of quality tourism experiences. Without adequate numbers of appropriately skilled workers it will be difficult for regional Victoria to increase its share of high yield tourists and realise potential growth. Labour and skills shortages are particularly acute in regional Victoria, where competition for labour is high and staff retention is difficult. This is accentuated by seasonality issues, distance and a lack of suitable accommodation which makes it especially hard to recruit and keep trained and experienced staff." (Regional Tourism Action Plan 2008-11 p.16)

The concept of agritourism actually answers a number of the questions highlighted by Tourism Victoria, in that farmers would be working for themselves, therefore labour shortages do not apply; retaining staff therefore is not a problem. Neither is seasonality an issue as farmers have their agricultural business as an alternative to tourism so they are not bound to only one activity, and obviously farmers opening up their homes to tourists immediately combats the accommodation problem. By ensuring agritourism operators are suitably trained prior to opening their businesses we also solve the skills shortage problem, while capping numbers permitted in each agritourism ensures the business can be family run and does not rely on outside employees – attractive in areas that suffer skills shortages.

A related crucial area for development is 'skill deficiencies', such as those that the Fellow identified and is the basis of this Fellowship. Skill deficiencies address future needs, whereas skill shortages replicate the past and are focused on immediate needs.

Accordingly, further Fellowships need to be funded and skills deficiencies identified and closed along the entire agritourism Value Chain to ensure the highest levels of skills/knowledge/understandings in-line with world's-best practices. An example is the 2007 'The George Alexander Foundation/ISS Institute Fellowship' which was funded by The George Alexander Foundation and awarded to Michael Dal Zotto, a winemaker at Dal Zotto Wines. He travelled to the Veneto Region in Italy to research prosecco clonal varieties, environmental factors, selection, propagation, canopy management, harvesting, storage, wine making and brand development and product positioning within a regional label.

Training too can help operators to develop not only excellent customer service, but also to develop interesting products with a range of activities to ensure the experiences offered meet visitor expectations:

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“As global competition for the tourist dollar increases, travellers have become more discerning about the experiences they require and have higher expectations about the standards of service they receive. Some of the issues limiting regional Victoria’s capacity to deliver consistent quality experiences to visitors include a low understanding of marketing and distribution, limited understanding of market demand and emerging consumer trends, failure to invest to improve products and a lack of export ready product.” (Ibid).

The development of training courses for farmers in agritourism should take into account these major issues of concern, and creative product development should be a core unit in the offerings. Using the Italian model we can also introduce innovative products to farmers to choose from as their working models; products like agricamping and the didactic farm can easily be implemented here. This product development training can be built into existing plans for tourism training as is forecast for the new Tourism Excellence Program as part of the Regional Tourism Development Program:

“This program will provide assistance in the areas of product development, research, industry development and tourism education.” (Ibid)

Setting up this range of training requires an appropriate curriculum to be written, modelled especially for agritourism operators. The units of training can be selected from the current industry training packages and can be delivered by the huge network of TAFEs throughout the country with campuses dotted throughout rural Australia. Delivery should be organised both through face-to-face classes or online distance learning in order to suit farmers’ other commitments.

We need to ensure both options are offered, taking into consideration the Italian operators’ concerns that not all farmers are computer literate and that farmers are very busy running their farms as well. Obviously computer and online marketing skills should be compulsory units in the training developed given the clear move by consumers to expect to buy tourism products and communicate in the online environment.

Suggested Specific Activities

Presentation of Fellowship Findings to Tourism Victoria

The Fellow presented her findings to relevant personnel at Tourism Victoria. The aim of this presentation was to present the findings and the recommendations of the study. It is hoped that further contacts at Tourism Australia will emanate from this initial meeting.

Presentation of the Concept of Agritourism to Farming Communities

Through a long-time association that Carolynne Bourne, CEO of the ISS Institute, has with Graham Nickless, Executive Manager – Economic Development of the Rural City of Wangaratta, a seminar, ‘Making Change in your Field’ was organised by Bourne for the Alpine Valleys Community Leadership Program. The majority attendees at the seminar were ex-tobacco farmers who were considering leaving the land as it had become unworkable due to soil chemical contamination.

The program focused on alternate approaches to farming practices and options to keep the farmers on the land, such as agritourism. The feedback was that the seminar was highly successful in stimulating discussion and action to develop alternate farming practices.

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The 'Making Change in your Field' program was as follows:

1. **Topic:** Farming: Be Smart. Be Informed. Act
Carolynne Bourne AM, CEO, ISS Institute
2. **Topic:** Alternate Crops – Truffles
Noel Fitzpatrick, ISS Institute/Italy (Veneto) Fellow. Fellowship Sponsor: Skills Victoria, Department of Innovation, Industry and Regional Development, Victorian Government
3. **Topic:** Agritourism
Pauline Porcaro, ISS Institute/Italy (Veneto) Fellow. Fellowship Sponsor: Skills Victoria, Department of Innovation, Industry and Regional Development, Victorian Government
4. **Topic:** Protected Cropping
Leig Taig, ISS Institute/TAFE Fellow. Fellowship Sponsor: Skills Victoria, Department of Innovation, Industry and Regional Development, Victorian Government

It is expected that similar presentations can be held with interested farming communities in Victoria. Initial contact has been made with Agribusiness Gippsland in order to act as a guest speaker at a number of forums; this includes the Victorian Agribusiness Summit 2009 in Gippsland. Similar arrangements have been made to speak in the Wellington Shire and in the Murray area.

The aim of these activities is to present the concept of agritourism to farming communities as a sustainable addition to their agribusiness activities and a method of improving their income, and to contribute to the growth of successful rural communities through the addition of tourism as a viable industry contributing to economic growth.

Fellowship Report to be Directed to Relevant Government/Industry Bodies

It is suggested that the Fellow's report be directed to the following government and industry bodies with the intention of raising the profile of the concept of agritourism as a viable and sustainable addition to Australia's tourism industry which can assist in rural economic development. Governments are realising the importance of farmers looking for new markets:

"To succeed in an increasingly competitive environment, farm businesses must increase their capability in developing new products, identifying and securing new markets, and maintaining access to existing markets." (Future Farming Strategy, p.39 <http://new.dpi.vic.gov.au/about-us/dpi-publications/future-farming>)

State Level

- The Hon Tim Holding MP, Victorian Minister for Tourism and Major Events
- Gregory Hywood, CEO, Tourism Victoria
- John Dalton, Director Strategy and Policy, Tourism Victoria
- Joe Helper, Minister for Agriculture in Victoria and the newly established Future Farming Advisory Panel, Department of Primary Industries, Victoria.
- The Hon Jacinta Allan MP, Minister for Regional and Rural Development and Minister for Skills and Workforce Participation, Department of Innovation, Industry and Regional Development (DIIRD)

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National Level

- The Hon Martin Ferguson AM MP, Minister for Resources and Energy, and Minister for Tourism
- The Hon Tony Burke MP, Minister for Agriculture, Fisheries and Forestry
- The Hon Dr Craig Emerson MP, Minister for Small Business, Independent Contractors and the Service Economy
- Geoff Buckley, Managing Director, Tourism Australia
- Rose Wright, Manager, Industry and Destination Development, Australian Regional Tourism Research Centre (ARTRC)
- Arthur Blewitt, CEO, AgriFood Skills Australia

Tourism Bodies

- Anita Donnelly, Industry Development Co-ordinator, Tourism Alliance Victoria
- National Tourism Alliance – admin@tourismalliance.org
- Ben Yates, CEO, Caravan, RV and Accommodation Industry of Australia Ltd (CRVA – <http://www.welovethiscountry.net.au/>)

Agricultural Bodies

- Ben Fargher, CEO, National Farmers' Federation (NFF)
- Wayne Harvey, CEO, Victorian Farmers Federation (VFF – <http://www.vff.org.au>)
- Simon Ramsay, President, Victorian Farmers Federation (VFF – <http://www.vff.org.au>)
- Lesley Young, National President, Country Women's Association of Australia
- Geoff Bloom, Executive Director, Rural Skills Australia, a not for profit organisation helping to increase the skills base of rural industries, particularly Agriculture.
- Mick Keogh, Executive Director, Australian Farm Institute

Media Release of an Article to Relevant Media to Increase the Profile of Agritourism

The first step in growing agritourism in this country is to obtain government support from both the tourism and agricultural sectors. The two must work together for this growth to occur. Apart from lobbying government for support it is also essential the word be spread to farmers about the range of possibilities open to them to start up in agritourism. Spreading this word could be done quite effectively through the farmers' groups available. With this in mind, the following groups have been chosen to initiate the interest of farmers in agritourism.

The National Farmers' Federation has a number of important links with the media. In addition the Australian Farm Institute's quarterly newsletter 'The Farm Institute Insights' will be targeted.

The Victorian Farmers Federation will receive the media release in order to target the following publications and means of communication they use:

- Victorian Farmer Magazine
- Commodity Newsletters
- Farmguide
- VFF Weekly Updates
- VFF Website

Also a national media release will be forwarded to all relevant tourism publications in order to gain business for the operators.

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Development of the Fellow's Recently Registered Business 'Agritourism Australia'

Since returning from the Fellowship journey and developing a commitment to growing agritourism in Australia, the Fellow and her husband have recently registered their new business, 'Agritourism Australia'TM and the domain name www.agritourismaustralia.com.au.



The Mission of the Business

Agritourism Australia will not only offer a premier marketing facility for agritourism services in Australia, it will be seen as a leader in the sector by providing advice and training to its clients in order to build a strong agritourism brand. With ongoing liaison with industry links it will promote the growth and development of the agritourism sector in Australia.

The Goals of the Business

- To champion the development of the agritourism sector in Australia
- To develop a strong and recognisable brand
- To assist operators in developing a professional agritourism industry
- To develop a newsletter for operators to assist in product development/marketing ideas
- To liaise with TAFEs throughout rural Australia to design appropriate courses for agritourism operators, particularly in Victoria
- To work with government tourism authorities to develop the agritourism product
- To aspire to tourism awards
- To make international connections for the business and to create some important web links for sales
- To develop a professional and accessible website
- To develop a sense of trust with operators
- To encourage operators to work towards tourism industry awards
- To connect with the business units of rural shires in order to spread the agritourism word
- To develop a product line called Agri-goodies[®] for direct sales of farm products
- To regularly speak at agribusiness forums
- To initiate the business in Victoria and one by one enter the other states
- To create strategic marketing links with European agritourism brands

The website is currently under construction with a completion date for late 2009.

With the new promotional tool specifically using the agritourism label it is hoped we see a gradual growth in agritourism in Australia in order to benefit both our farmers' economic situation and the development of new infrastructure to draw tourists into rural areas and to open opportunities for those along the Value Chain.

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Liaise With the ARTC for the Development of Agritourism in Australia

The ARTC is seen to be an important contact for the development of agritourism in Australia. The ARTC is a partnership between the Sustainable Tourism Cooperative Research Centre (STCRC) and Southern Cross University (SCU). The Centre was formed to undertake research and extension activities to assist in the growth of tourism industries which would contribute to sustainable communities in regional Australia.

Rose Wright, Manager for Industry and Destination Development at the ARTC, has been involved with the 'Farm and Nature Tourism on Your Property Business Development Program', which she has already extended to areas within NSW, Victoria and Queensland. There has been a large amount of interest generated in this program that was essentially designed to act as a catalyst for the establishment of agritourism and nature-based tourism clusters in rural and regional communities across Australia. With her assistance it is hoped the concept of agritourism can be developed rapidly in rural communities throughout the countryside. Initial contact has been made to commence this process.

Develop an Official Connection With the Gallo Rosso in Italy

It is proposed to create an official link with the Gallo Rosso in Italy due to their in depth knowledge on growing the demand for agritourism through branding. The Alto Adige region has seen a strong growth in its agritourism sector due to their marketing and specifically their branding efforts.

Already through the Fellowship, a collegial relationship has been built between the Fellow and Dr Hannes Knollseisen at the Gallo Rosso. It is envisaged that this relationship can be built upon in the form of mentoring and to further the connection between Tourism Victoria and Agritourism Australia in order to grow Australian agritourism. Contact with Dr Knollseisen has been maintained since returning from the Fellowship journey.

Organise an Agritourism Forum With Dr Hannes Knollseisen From The Gallo Rosso

An official forum on agritourism is proposed. This forum could be part of a Tourism Australia and Tourism Victoria initiative, inviting members of the Farmers' Federation and farmers from around Australia to Melbourne, or a central rural city like Ballarat, with the objective of growing agritourism in Australia.

The forum should present a range of elements such as a showcase of successful agritourism businesses from the Alto Adige and from Australia, the Gallo Rosso's successful marketing of agritourism, e-marketing and the possibilities for farmers, quality labelling and standard controls, and developing regional brands. This forum could be considered to be a part of the next Australian Regional Tourism Convention; the previous convention was held in South Australia in September of 2008. Planning would need to commence immediately if this were to be a possibility for late 2009 or 2010. Dr Knollseisen has already expressed an interest in taking part in such a forum.

Liaise With the Farmers Union to Disseminate Information re Agritourism

As mentioned above, this report will be forwarded to a number of relevant farmers' bodies in order to grow the concept of agritourism. The Gallo Rosso found their farmers' union to be the best way to disseminate information to farmers about agritourism and about their brand when it commenced.

Knowledge Transfer: Applying the Outcomes

The main bodies to be contacted are:

- National Farmers Federation
- Victoria Farmers Federation
- Agforce Queensland
- NSW Farmers Association
- Pastoralists and Graziers Association of Western Australia
- Western Australian Farmers Federation
- Tasmanian Farmers and Graziers Association
- Australian Dairy Farmers
- Australian Chicken Meat Federation
- Cattle Council of Australia
- Grains Council of Australia
- Sheepmeat Council of Australia
- Wool Producers Australia

Liaise With the Relevant Tourism Bodies to Disseminate Information re Agritourism and Grow the Recognition of the Concept

It is proposed that the relevant tourism bodies in each state receive details of the Fellow's journey and findings and be introduced to the Agritourism Australia business in order to grow the recognition of agritourism as an important new growth area for Australian tourism. Regional tourism organisations, state tourism organisations, Local Government tourism offices, and regional tourism enterprises will be contacted in 2009 with details.

Recommendations

The following are recommendations to government, industry, professional associations, education and training, our community, and the ISS Institute Inc.

Government

Federal Government

- Legally define the term agritourism and how it will be used in the Australian context. It is recommended the Italian definition be followed, specifically in terms of clearly clarifying the difference between rural tourism and agritourism.
- The synergies between agriculture and tourism should be recognised at a national policy level and both agriculture and tourism policies should be developed with the objective of growing agritourism in Australia. The triple bottom line (TBL) aspect of such a synergy should be highlighted. Agritourism is socially, economically, and environmentally responsible tourism which develops new tourism infrastructure within existing structures with minimal impact; in other words, a truly sustainable tourism development.
- The Future Farming Strategy should include agritourism as an option under their 'developing new products and securing new markets' information.
- Government should allocate funds through their farm help funding schemes to assist farmers in renovating their properties to be suitable for tourists. An imperative of the terms of farmers receiving this funding should be that they must commit to a period of operation as a tourist venue, possibly modelled on the Italian 10 years of operation clause. Additionally, terms should include a basic training requirement so that we provide visitors with a skilled industry. Regulations on courses for operators should take into consideration that any partner in the relationship can do the course, unlike the Gonelli situation in Italy where the farmer himself had to take the course but lacked the time. The course should be available to any family member who commits to running the agritourism side of the business.

The other consideration for government in defining the terms of funding should be to limit the number of beds an agritourism can offer, ensuring a TBL approach to the development of agritourism. This will share the work and funds around to many farmers, not negatively impacting on the farm environment due to small numbers of tourists, and not negatively impacting on the farm work that needs to be maintained if we are to sustain a strong agriculture industry.

- Introduce a funding scheme to replace the now terminated Farm Help scheme through The Department for Agriculture, Fisheries and Forestry: <http://www.daff.gov.au/agriculture-food/aaa/farm-help>.
This will specifically fund farmers to start up in agritourism as they have done in Italy. The previous scheme offered income support and re-establishment funds. A specific fund should be set up to fund agritourism establishments with the objective of keeping farmers on the land rather than re-establishing themselves elsewhere.
- Government should develop training programs for potential operators through AgriFood Skills Australia and Service Skills Australia and their state bodies. This can be delivered through TAFEs and overseen and promoted by Rural Skills Australia.

Recommendations

- Tourism Australia should conduct further research on agritourism and expand the information found on their 'Know your markets', 'Agritourism', section of their website: <http://www.tourism.australia.com/Marketing.asp?lang=EN&sub=0437&al=2560>
- Tourism Australia to market agritourism to the German, Dutch and Italian markets who are vary experienced users of the agritourism product, as well as specific niche markets like the Global Experience Seeker.
- Develop specific agritourism sign posting in rural areas and include agritourism signs in the future plans for better tourism signage – it is clear from the Italian experience that a clear 'agritourism' road signage system helps to create recognition of the agritourism label and promote the experience while it assists travellers in the countryside to find suitable accommodation.
- Develop guidelines on quality standards and facility development for agritourism businesses together with relevant tourism bodies (refer to the example of the model for accommodation quality standard assessment provided by Dr Knollseisen at Attachment 5). It is important to develop a national quality standard so that tourists are not confused by multiple standards. This seemed to be the major fault found in the Italian system where quality standards differ according to regions. It is confusing for tourists travelling between areas.
- Negotiate with insurance companies through Tourism Alliance or the Farmers' Federation to provide economically viable insurance packages for farmers wishing to open agritourisms. Initial contact should be made with Elders FarmGate:

"For over 25 years FarmGate, the regional arm of Elders have been the preferred general insurer of the Victorian Farmers Federation. They are a key partner with the VFF in working to make farmers lives easier. FarmGate is also the key corporate sponsor of the VFF, which means that as FarmGate grows, so does the VFF. The FarmGate Package offers a single product with a range of options to suit your individual needs. Along with the personal advice given to you by their qualified representatives, all VFF members receive consistent and competitive pricing." (www.vff.org.au)

State Government

- 'Agritourism: Victoria Leads the Way': Skills Victoria to fund ISS Institute under their Overseas Skills Acquisition Plan (Fellowship Program) to bring a number of experts to Victoria in specific areas related to skills deficiencies in agritourism including Dr Hannes Knollseisen from the Gallo Rosso to Victoria.

As for other international Fellows, there should be a two-week program encompassing a range of activities including an ISS Institute agritourism forum. A key strength of ISS Institute is its independence and its proven capacity to deliver quality programs within an holistic approach, drawing together those along the Value Chain.
- Build awareness of the agritourism product in the community through a range of marketing methods: website, media releases, brochures, trade and consumer shows, publications, and inclusion in all advertising eg: in the 'You'll love every piece of Victoria' campaign.
- Tourism Victoria to promote and plan for agritourism as a parallel product to the important food and wine sector in Victoria.

Recommendations

- Tourism Victoria and other state tourism bodies to develop a specific information kit for operators wishing to start up in agritourism.
- Tourism Victoria to assist regions in building a regional brand and identity through specific food and wine products offered through agritourisms like the Gallo Rosso products brand.
- Tourism Victoria and other state tourism bodies to recognise the importance of agritourism in filling the critical shortage of accommodation product in rural areas.
- Work with the national tourism body to develop awareness of agritourism and commence an awareness campaign in rural areas.
- Tourism Victoria and Tourism Australia to host an agritourism forum as mentioned in 'Knowledge Transfer: Applying the Outcomes' chapter.
- State tourism bodies to work with rural areas to create regional brands as the Gallo Rosso have done; perhaps link in with farming bodies to do this.
- Add products like agricamping and didactic farms to the suite of brochures currently developed by state tourism bodies like Tourism Victoria.

Local Government

- Organise coordination and communication platforms for agritourism operators for networking and regional tourism development purposes.
- Assist in the development of awareness of the agritourism concept through hosting of agritourism information forums.
- Market agritourism business through local visitor information centres.
- Assist in the development of local agritourism brands and build a local food and wine base expressive of the region.

Industry

- Both farmers' groups and tourism bodies should assist in the lobbying of government to provide funds for farmers to develop an agritourism product.
- Develop marketing avenues for agritourism product.
- Westpac Agribusiness to look at including agritourism as an option in their workshops for farmers.
- Local tourism associations and authorities must ensure that their agritourism sites have search engine optimisation.

Existing or Proposed Operators

- Become involved in local agritourism networking groups or if none available, champion the instigation of such groups in order to raise the profile of agritourism in each area.
- Work together with other operators, local councils and local visitor information centres to develop holistic product offerings and raise the profile of the local area's food and wine experiences.
- Explore new and innovative possibilities for agritourism product development by modelling on some of the Italian products eg: agricamping and didactic farms.
- Develop affordable accommodation in order to attract a broad range of markets

Recommendations

Professional Associations

- National and State Tourism Alliance to assist in lobbying government to provide funding to farmers to establish agritourism businesses.
- Tourism Alliance to include agritourism as a topic at their annual conference.

Education and Training

- Promote recognition of prior learning (RPL) to farmers already operating tourism businesses in order for them to achieve accreditation.
- AgriFood Skills Australia and Service Skills Australia to design a course for agritourism operator accreditation in line with the current accreditation system. Subjects to be covered must include business planning, product development, finance, marketing, e-communication, and customer service. Adjunct courses to be targeted to add further skills to value adding regional produce.
- Rural TAFEs should liaise with farmers wishing to start up restaurant or food services to provide trained cooks or waiters.
- Regional TAFEs in Australia to provide specific industry training in line with government policy on agritourism when it is finalised.
- Courses offered for farmers should be provided at different levels ie: beginners, intermediate and advanced, to combat the situation raised by Righetti where many courses were 'dumbed down' for farmers just beginning their involvement in agritourism.
- Rural Skills Australia to oversee training for agritourism operators.
- Develop online courses in agritourism accreditation to be made available to farmers in remote areas.

Community

Farming communities should work together, using the WRTD approach, to raise the profile of rural communities as prime tourism destinations by developing agritourism product and infrastructure.

ISS Institute Inc

The ISS Institute can assist the Fellow in disseminating this report to the relevant government bodies mentioned above.

Additionally, as mentioned, it is recommended that the ISS Institute develop and implement a series of Fellowships under the title, 'Agritourism: Victoria Leads the Way'– Skills Victoria to fund ISS Institute under their Overseas Skills Acquisition Plan (Fellowship Program) to bring Dr Hannes Knollseisen from the Gallo Rosso to Victoria. The Institute would seek links with Tourism Victoria and Tourism Australia, so that Dr Knollseisen may pass on his breadth of knowledge in building an agritourism brand first hand.

Recommendations

Conclusion

This Fellowship journey has taken a completely new focus for the Fellow. Initially in planning, the focus was on tourism, but after meeting the farmers in Italy it was noted that the tourism service is a bonus, albeit a substantially important one, to growing economic independence of our farming communities and providing them with an avenue to stay on the land.

Agritourism is about building a stronger economic position for farmers and rural communities; simultaneously our tourism industry benefits through the provision of sustainable rural accommodation and tourism product. It was also evident that a strong agritourism product does not grow on its own. Government financial support and planning support is critical to its success. In providing this support governments contribute to the healthy growth of two industries. Importantly, this growth is completely sustainable and reduces the negative impacts on small communities that has been evident with some major tourism infrastructure growth in rural areas.

Australia has the quality of product and quality agricultural regions to grow a healthy agritourism industry. There are many farmers already opening up small businesses from their rural position. However, the sector is developing in a haphazard and disorganised fashion. The Italian model demonstrates the importance of persistent and consistent coordination in the development and marketing of the product and it is this which we need to achieve in order to develop a world-renowned agritourism sector.

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Attachments

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Attachments

Attachment 1: Le Fattorie Didattiche Del Veneto, a guide to the educational farms in the Veneto Region

Guida alla consultazione dell'opuscolo

In questo opuscolo vengono schematicamente descritte le fattorie didattiche iscritte al Terzo aggiornamento dell'Elenco regionale (gennaio 2006).

Le fattorie didattiche, suddivise su base provinciale, sono state inserite in ordine alfabetico.

Ciascuna fattoria didattica è caratterizzata da due numeri:

- il primo serve per localizzarla indicativamente nella cartina provinciale;
- il secondo indica il numero progressivo nell'Elenco regionale.

L'offerta didattica della fattoria viene proposta, secondo la seguente classificazione:

- **percorsi didattici:** nel caso in cui si svolgono all'aperto e vengono privilegiati l'insegnamento teorico e l'osservazione;
- **laboratori:** nel caso in cui si svolgono all'interno dell'aula didattica e vengono privilegiati l'insegnamento pratico e la manualità;
- **altre attività:** nel caso in cui vengono privilegiati la conoscenza dell'ambiente naturale, l'aspetto ludico e il racconto orale.

In quest'ultima categoria, vengono anche inserite le attività esive per i ragazzi o la disponibilità all'accoglienza di gruppi di adulti e di persone diversamente abili.

Per consultare una consultazione più agile ed immediata da parte degli insegnanti di diversi cicli scolastici, la complessiva offerta didattica di ogni fattoria viene caratterizzata dai seguenti simboli:

Eventuali ed ulteriori servizi offerti dalle fattorie didattiche sono così simbolizzati:

- **Adatta ai bambini della scuola dell'infanzia**
- **Adatta agli alunni della scuola primaria**
- **Adatta agli studenti della scuola secondaria di primo grado**
- **Adatta agli studenti della scuola secondaria di secondo grado**

Possibilità di pernottamento in azienda o in agriturismo

Disponibilità alla preparazione e somministrazione di merende

Disponibilità alla preparazione e somministrazione di pranzi

Sul sito web regionale www.regione.veneto.it/agricoltura sarà possibile consultare i prossimi aggiornamenti dell'Elenco regionale delle fattorie didattiche.



Provincia di Belluno



1 ALBERO DEGLI ALBERI - Siren del Grappa

PERCORSI DIDATTICI
In montagna: lettura del paesaggio, conoscenza del bosco e sulla roccia; come riconoscere, giocando, erbe spontanee, arbusti, alberi e antraciti.
La vita del montanaro: la casa e la pietra; l'alimentazione; il rapporto uomo - animali - territorio; la montagna; il fieno e il fuoco; abitudini di vita, credenze e racconti.
Il boscaiolo: il lavoro e gli attrezzi; gli alberi, i legni e il loro uso nella tradizione; le capanne nel bosco.
Culture e attività aziendali: il castagneto, il noceto, gli alberi da frutto, l'orto e i fagioli; la vita nel pollaio e nell'ovile; gli animali della fattoria.
Animali domestici: alla conoscenza dei nostri compagni di vita.

LABORATORI
In cucina: lavorazione del pane e cottura nel forno a legna; il biscotto e la pasta.

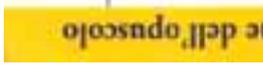
ALTRE ATTIVITÀ
I sassi raccontano: come inventare, costruire e scoprire con i sassi del torrente.
Le fiabe e le storie di una volta attorno al fuoco.
Settimane verdi per bambini in estate
Attività ricreativo-culturali per adulti

2 FIOROT ANGELO - San Gregorio nelle Alpi

PERCORSI DIDATTICI
La lavorazione del latte: come e perché le bovine producono il latte; visita alla stalla e alla sala mungitura; le caratteristiche del latte.
L'attività di malga: i buoni formaggi di montagna.

LABORATORI
L'arte della caseificazione: per imparare e conoscere come, dalla mungitura, si giunge al prodotto finito.

ALTRE ATTIVITÀ
Passaggi ed escursioni, per conoscere la flora e la fauna di montagna.
Giochi all'aria aperta



Provincia di Belluno



Attachments

Attachment 2: Statistics from the Veneto Region – number of agritourisms per province

Provincia	Gennaio 2006		Giugno 2006		Incremento 2006
	Attive	Provinciale	Attive	Provinciale	
Belluno	98	Belluno	98	4%	
Padova	166	Padova	166	18%	
Rovigo	45	Rovigo	45	13%	
Treviso	270	Treviso	270	15%	
Venezia	99	Venezia	99	12%	
Verona	266	Verona	266	13%	
Vicenza	223	Vicenza	223	14%	
TOTALE	1011	TOTALE	1167	13%	

ATTIVITA' ESERCITATE	Gennaio 2006		Giugno 2006		Gennaio 2006		Giugno 2006		Gennaio 2006		Giugno 2006	
	Pasti e bevande	Pasti e bevande	Alloggio	Alloggio	Attività ricreative	Attività ricreative	Vendita prodotti	Vendita prodotti	Agricampeggio	Agricampeggio	Bevande, spuntini	Bevande, spuntini
Belluno	61	62	47	52	20	12	43	56	2	2	57	63
Padova	78	74	66	73	46	22	87	89	4	4	80	84
Rovigo	17	20	28	34	18	8	8	8	6	6	15	17
Treviso	174	187	136	148	69	21	62	94	0	0	111	142
Venezia	47	51	43	52	36	12	38	40	9	10	33	40
Verona	98	115	136	180	50	41	42	56	12	12	73	101
Vicenza	130	135	95	95	51	51	88	147	5	5	89	116
TOTALE	605	644	532	627	306	177	375	492	46	39	474	563

Provincia	% ATTIVITA' ESERCITATA AL 17 GIUGNO 2006					
	Pasti e bevande	Alloggio	Attività ricreative	Vendita prodotti	Agricampeggio	Bevande, spuntini
Belluno	1,61	4,08	-6,02	35,81	-1,38	3,05
Padova	-7,42	-1,36	-20,75	9,61	-1,58	-2,73
Rovigo	0,91	3,74	-36,92	59,15	-2,05	-0,68
Treviso	-6,30	-4,80	-22,22	4,81	-1,74	1,72
Venezia	-2,41	3,10	28,11	3,14	-0,24	2,47
Verona	-1,21	5,84	1,78	7,42	-0,94	4,79
Vicenza	-2,32	-1,38	6,30	37,12	-2,47	0,19
TOTALE	-4,86	1,11	-19,00	11,89	-1,41	1,26

LEGEND

Pasti e bevande – meals and drinks

Alloggio – accommodation

Attività ricreative – recreational activities

Vendita prodotti – products for sale

Agricampeggio – agricomping

Bevande, spuntini – drinks and snacks

Gennaio – January

Giugno – June

Attive – active

Incremento – increment

Tabella 2: Situazione dei servizi agrituristici nel Veneto (17 giugno 2006)

AZIENDE IN ATTIVITA'	
Provincia	Attive
Belluno	98
Padova	166
Rovigo	45
Treviso	270
Venezia	99
Verona	266
Vicenza	223
TOTALE	1167

Provincia	ATTIVITA' ESERCITATE					
	Pasti e bevande	Alloggio	Attività ricreative	Vendita prodotti	Agricampeggio	Bevande, spuntini
Belluno	62	53	12	56	2	63
Padova	74	73	22	89	4	84
Rovigo	20	34	18	8	6	17
Treviso	187	140	21	94	0	142
Venezia	51	52	12	40	10	40
Verona	115	180	41	56	12	101
Vicenza	135	95	51	147	5	116
TOTALE	644	627	177	490	39	563

Provincia	% ATTIVITA' ESERCITATA SU TOTALE PROVINCIALE					
	Pasti e bevande	Alloggio	Attività ricreative	Vendita prodotti	Agricampeggio	Bevande, spuntini
Belluno	63,27%	54,08%	12,24%	57,14%	2,04%	64,29%
Padova	44,56%	43,98%	13,25%	53,61%	2,41%	50,60%
Rovigo	44,44%	75,56%	40,00%	17,78%	13,33%	37,78%
Treviso	69,26%	51,85%	7,78%	34,81%	0,00%	52,59%
Venezia	51,52%	52,53%	12,12%	40,40%	10,10%	40,40%
Verona	43,23%	67,67%	15,41%	21,05%	4,51%	37,97%
Vicenza	60,54%	42,60%	22,87%	65,92%	2,24%	52,02%

Provincia	% ATTIVITA' ESERCITATA SU TOTALE REGIONALE					
	Pasti e bevande	Alloggio	Attività ricreative	Vendita prodotti	Agricampeggio	Bevande, spuntini
	55%	54%	15%	42%	3%	48%

Attachments

Attachment 3: Example from the Gallo Rosso *Flavours From the Farm* promotional booklet

Neufeldhof



Michael Komiss
Via Leopold 16
39100 Bolzano
Tel. 0471 633 129
0 338 5 090 781
Fax 0471 631 396
info@frutty.it
www.frutty.it

I nostri prodotti

frutta essiccata (mele da 15 g, 25 g, 50 g, 100 g, 500 g;
mele con cannella o cioccolato da 50 g; prugne, pere e
cachi, da 100 g)



Da Bolzano andare in direzione di Merano, all'incrocio dell'ospedale di Bolzano girare a sinistra e imboccare la Via Moritzinger Feldweg. Dopo 100 m svoltare di nuovo a sinistra e imboccare la Via Leopold. Dopo circa 500 m svoltare a destra e seguire la stradina fino al maso.



Oberkostner-Hof



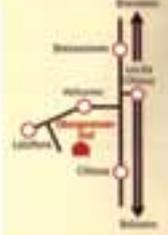
Johann Gasser
Pardell 51
39043 Chiusa
Tel. 0472 855 548
0 348 2 241 146
Fax 0472 855 548
johann@gasser.bz.it
www.gasser.bz.it

I nostri prodotti

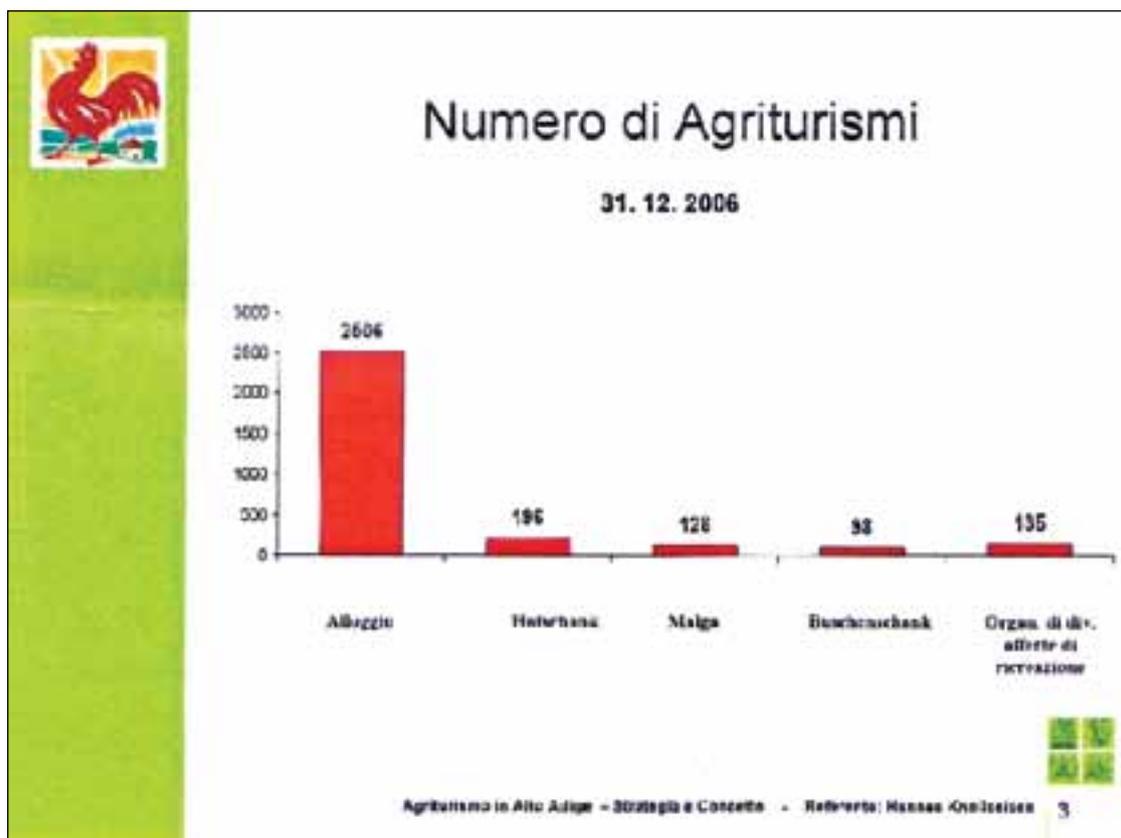
frutta essiccata (mele, pere, da 50 g, 100 g)



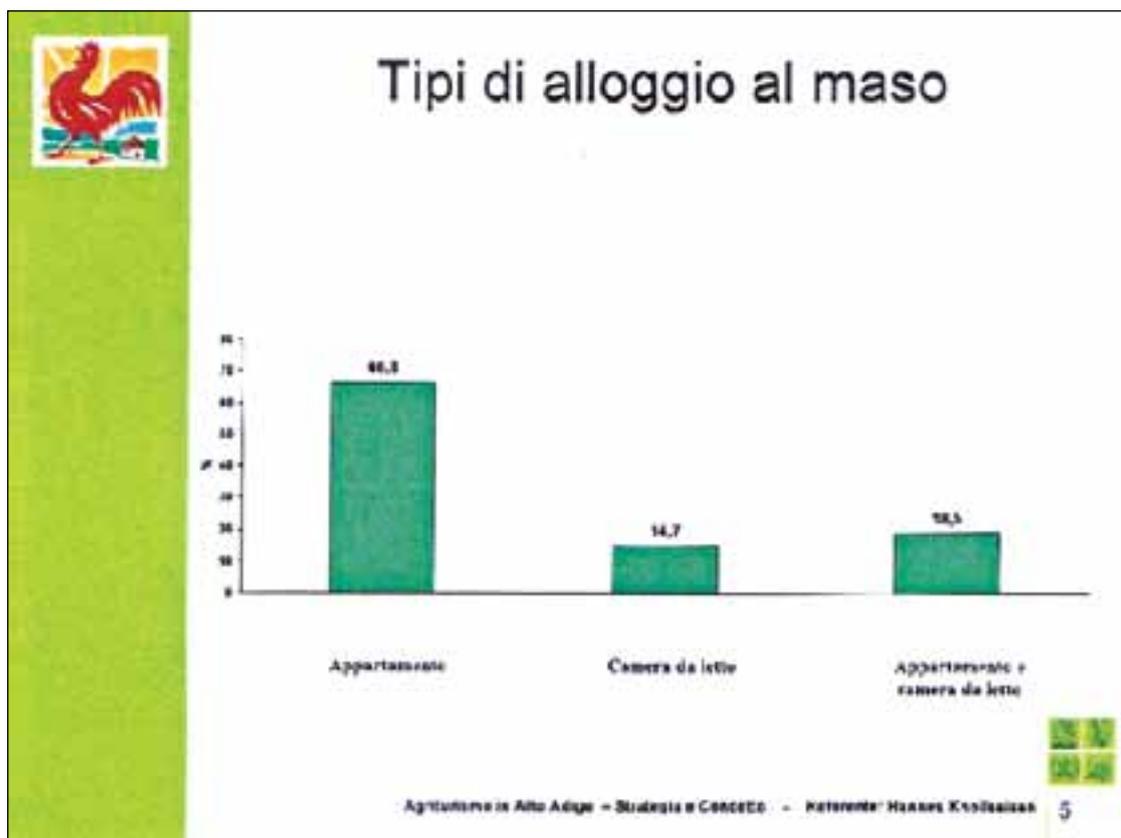
Da Veltro proseguire in direzione Verdings. Proseguire per Pardell. Il maso "Oberkostner-Hof" si trova direttamente nel piccolo centro di Pardell (segue i cartelli).



Attachments



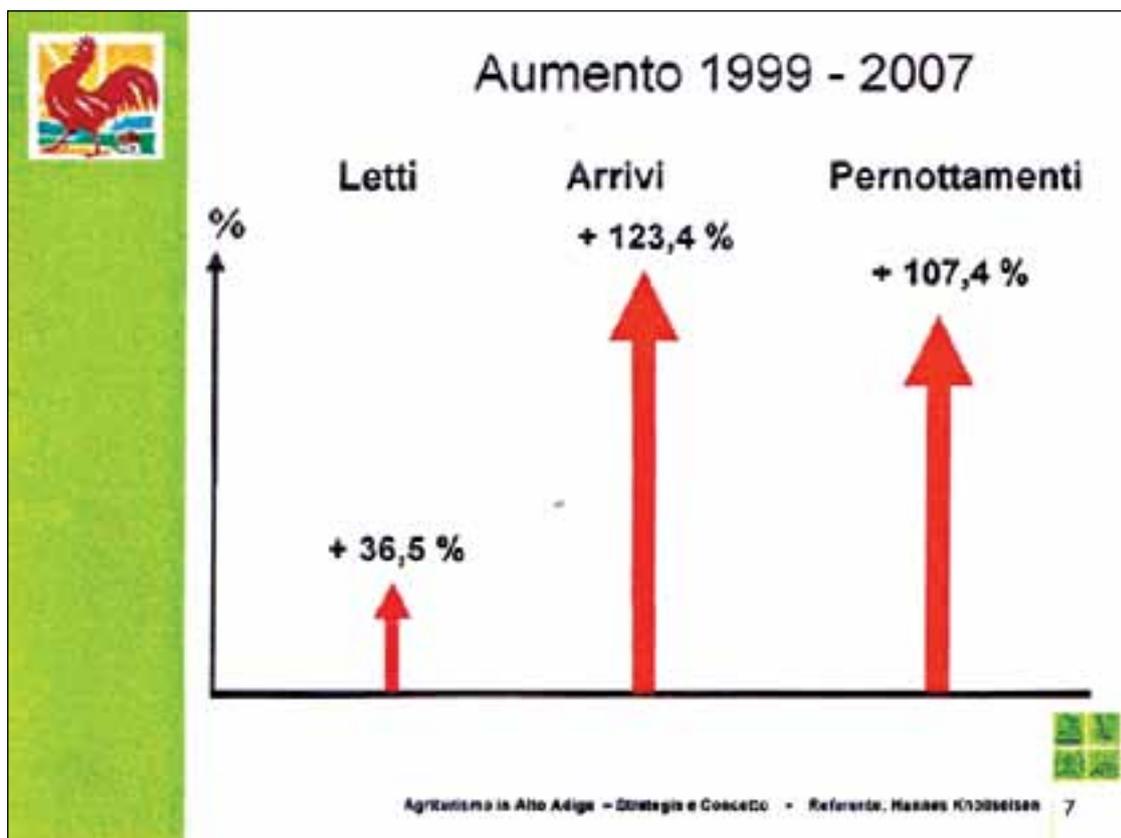
Attachments



Sviluppo dell'alloggio al maso

	Anno		
	1999	2002	2007
•Letti	15.067	16.986	20.573
•Arrivi	108.535	182.754	242.439
•Pernottamenti	797.688	1.320.044	1.654.097

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Alloggio al maso

- **1200 masi**
 - Catalogo con 90.000 esemplari
 - Newsletter
 - Mercati principali: Germania e Italia
 - Nuovi mercati: Paesi Bassi e Belgio
 - Presenti su fiere in Italia
 - Presenti su Internet www.gallorosso.it
 - Contatti con giomalisti
 - Collaborazione con SMG (Alto Adige Marketing)
 - Promozione attraverso il marchio ombrello „Gallo Rosso“

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Osterie contadine

- **34 Masi**
 - Adesione limitata (criteri di qualità molto severi)
 - Opuscolo „Masi con gusto“ (70.000 esemplari)
 - Distribuzione attraverso Associazioni Turistici e Cassa Rurale
 - Promozione attraverso la piattaforma www.gallorosso.it
 - Collaborazione con agenzie stampa in Italia e Germania



Prodotti di qualità dal maso

- **37 masi**
 - Adesione limitata (criteri di qualità severi)
 - Catalogo „Sapori del maso“
 - (140.000 esemplari)
 - Distribuzione: supplemento ai quotidiani „Dolomiten“ e „Alto Adige“
 - Collaborazione con commercio al dettaglio
 - Presenti su diversi manifestazioni
 - Promozione attraverso la piattaforma www.gallorosso.it
 - Collaborazione con agenzie stampa in Italia e Germania



Attachments




**Unione Agricoltori e Coltivatori Diretti
Sudtirolesi**
Dipartimento Marketing
Dott. Hannes Knollseisen
Via Kanonikus Michael Gamper 5
39100 Bolzano
Tel. 0471 999 325
info@gallorosso.it
www.gallorosso.it

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Legend for Statistics

Numero di agriturismi – number of agriturisms

Aumento degli agriturismi – increase in number of agriturisms

Tipi di alloggio al maso – types of farm accommodation

Sviluppo dell 'alloggio al maso – growth in farm accommodation

Aumento – increase

Letti – beds

Arrivi – arrivals

Pernottamenti – bookings

Attachments

Attachment 5: Gallo Rosso criteria for accommodation assessment

1. Quality of the farm	
1.1. Position / Access	
is the farm well signed, to find easily	<input type="checkbox"/> <input type="checkbox"/>
is there a sign at the farm that shows the name of the farm	<input type="checkbox"/> <input type="checkbox"/>
1.2. Garden, Area around the farm	
structure of the house, is it in good condition	<input type="checkbox"/> <input type="checkbox"/>
Parking, enough parkin spots	<input type="checkbox"/> <input type="checkbox"/>
area around the farm (well cared-for - flowers)	<input type="checkbox"/> <input type="checkbox"/>
1.3. waste disposal	
do they separate the garbage by paper, glass, metall, organic...	<input type="checkbox"/> <input type="checkbox"/>

Attachments

2. Quality of the equipment

2.1. area of entrance

cleanliness

structure in good condition

2.2. area of ristoration (inside)

cleanliness

general condition of the structure

decoration

number of places to sit in a room (not more than 30?)

furnishings (rural, traditional)

enough lights in the room (at least a light over each table)

Quality of floor (wood?), curtains (good condition, clean)

Is there a hall-stand or wardrobe

2.3. area of ristoration (outside)

table and seats made up of wood

nice terrace with good scenery

quality of the wood

condition of terrace is well cared-for

Attachments

playground for children with at least 3 equipments

--	--

2.4.Kitchen

cleanliness

--	--

2.5. Toilets

good condition of the structure

--	--

closable dustbin in the female toilet

--	--

opportunity of ventilation (natural (window) or mechanic(ventilator))

--	--

general cleanliness

--	--

mirror with light

--	--

enough paper to dry the hands

--	--

toilets are separated (male and female)

--	--

Attachments

3. Quality of Service

3.1. Services

uniform service (plates, forcs, knives, glasses)

--	--

Extra service for children

--	--

menu (do they have a written menu)

--	--

promotional material (visiting card...)

--	--

3.2. are the self made products up for sale

3.3. self made products

number of homegrown products offert in the menu

--	--

3.4. Number of offert dishes (minimum 5 warm and 3 cold dishes)

number of refined self made products (jam, chees, wine, speck, grappa, honey...)

--	--

meat from own production offert in the menu (lamb, cattle, pig...)

--	--

number of home grown juices offered (minimum 2 juices)

--	--

which products are bought from other farms in South Tyrol

--	--

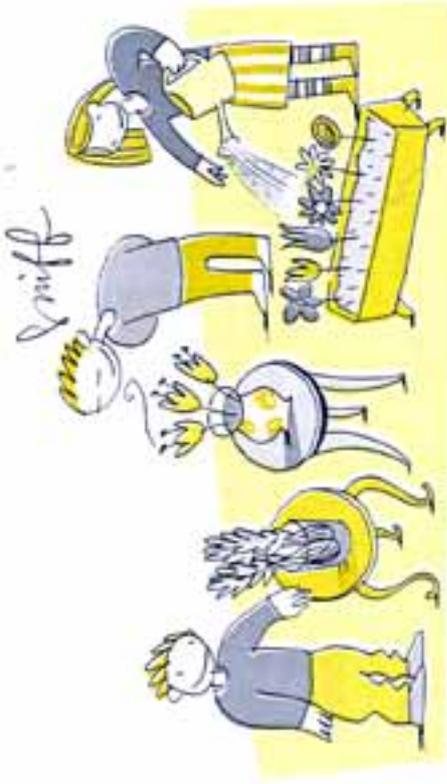
3.5. Education (did the farmer take a course of specialization)

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Attachments

Attachment 6: Excerpt from the booklet of activities provided to farmers, *Culture That Nourishes*

<h2>I figli dei fiori</h2>	
	Area: scientifica
	Quantità: in piccoli gruppi
	Età: dal 4 anni in su
Ingredienti: Fiori e foglie di piante diverse; le stesse foglie in stagioni diverse; due gambi di sedano, colorante per alimenti, acqua, due bicchieri.	
Tempo di preparazione: Un'ora per mettere insieme e discutere la raccolta di foglie e fiori; una notte perché il colorante risalga lungo il gambo; un'altra ora per discutere i risultati.	
Obiettivi: Capire come si nutrono le piante; distinguere fra piante diverse.	
Raccordi interdisciplinari: Area motoria ed educazione alla salute (i capillari svolgono nelle piante una funzione analoga a quella del sistema sanguigno).	
In breve: <i>Le foglie raccolte durante le uscite possono essere raccolte in un'erbario: così facendo possiamo sottolineare le differenze fra le diverse piante. Durante questo esperimento manterremo anche come i vegetali si nutrono. L'attività può essere proseguita con la coltivazione di semi e con l'osservazione di tutto il ciclo vitale di una pianta, a partire da un fogliolo "piantato" su cotone bagnato o da una patata immersa per metà in acqua.</i>	



Cosa fare: Raccogliamo e classifichiamo il materiale vegetale raccolto durante l'uscita didattica; sarebbe interessante osservare le foglie degli stessi alberi in stagioni diverse.

Discutiamo insieme cosa hanno in comune o meno le diverse piante. In particolare, di cosa ha bisogno una pianta? Di acqua, terra e luce: ogni pianta avrà bisogno di una quantità diversa di acqua, di un terreno leggermente diverso e di una giusta (e differente) illuminazione. Da dove sale l'acqua? Mettiamo del colorante alimentare in un bicchiere, in modo da avere acqua colorata. Immergiamoci un gambo di sedano.

Immergiamo l'altro gambo di sedano in acqua normale, come test di controllo. Lasciamoli tutta la notte in acqua.

La mattina successiva, i due gambi di sedano saranno belli dritti: l'acqua è salita dentro il fusto e li ha raddrizzati. L'acqua colorata, salendo, ha lasciato il colore, in modo che possiamo vedere chiaramente da dove è passata, lungo il gambo e nelle foglie. Se guardiamo le foglie, riconosciamo un sistema di nervature simile: sono i capillari che distribuiscono l'acqua in tutte le cellule della pianta. La stessa cosa è successa anche nel gambo immerso in acqua normale, solo che in questo caso l'acqua è trasparente e non la vediamo!

L'esperienza può proseguire anche con piccole coltivazioni, se la scuola ne offre la possibilità.