Cross-country analysis of differentiation strategies of Italian and German farm tourism: a hedonic pricing approach

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1. Cross-country analysis of differentiation strategies of Italian and German farm tourism: a hedonic pricing approach

1.1 Introduction

This paper is dedicated to farm tourism, which is a subset of rural tourism (Nickerson, Black & McCool, 2001). Whereas the latter encompasses all activities which are undertaken in rural areas such as eco-tourism, adventure tourism, etc., (McGehee & Kim, 2004), the former generally refers to "the commercial tourism on working farms" (Ollenburg & Buckley, 2007).

Against the background of decreasing subsidies in agriculture, the importance of farm tourism has increased all over Europe in the last years (ibid.). If, on the one hand, farm tourism has been recognized as a viable business which enables farm operators to have a complementary income, on the other hand, many studies indicate that farmers have "very limited entrepreneurship capabilities related to innovations in management, product development and planning for future growth" (Veeck, Che & Veeck, 2006: 246).

This paper examines the level of professionalism reached by farm operators thus aiming at better orienting practitioners towards customer needs. To this end, we have conducted a cross-country analysis of farm tourism in Germany and Italy, which explores commonalities and differences in this sector between the two countries. In doing so, the multidimensional nature of this tourism form is taken into account, as the success of farm tourism greatly varies among countries.

In Italy, for instance, with around 2 million guests annually, farm tourism has been flourishing for years (ARM, 2003). Nevertheless, despite these figures, it remains a niche segment. On the other side, German farm tourism has been gradually declining since peaking in late 1996 when it reached a volume of 3.9 million guests annually (BMELV, 2006) and image deficits are still a main issue according to several practitioners (BAG, 2008; Wagner, Burger, & Magnus, 1997).

The main idea is that a comparison approach between the two countries could help both German and Italian farm operators to develop common strategies to improve their businesses as well as to generate important insights into the sector.

The following pages will discuss the main similarities and differences between the two countries regarding this form of tourism. Furthermore, we will present a comparative case study based on a hedonic price analysis.

1.2 Comparison of main differences and similarities

At first glance, Italian farm tourism is distinguished by a higher overall quality of supply and a positive image derived from the high degree of appreciation among national and international guests (ARM, 2003). This has been encouraged above all by a proactive Government: in fact, Italy is the only European country which has a law dedicated to this form of tourism (INNOREF, 2006), since the majority of countries do not distinguish between rural tourism and farm tourism (ibid.). Moreover, in many Italian regions several interest groups - to which many farmers belong - work together (e.g. Slow Food Movement, Committees for Protected Food, etc.) by networking activities (i.e. cross-promotion), sharing common Websites, participating to local festival committees (Italian *sagre*), etc. Thus, Italian farmers know that individuals value the stunning environment created by the agriculture and a rich variety of seasonal programs which include the subjects of healthy cuisine, history, nature and agriculture, such as the production of organic olive oil and the sampling of wine and food. The reverse of the coin is, however, the "concern that "boutique" farms may replace authentic agriculture to receive funds" (Adams, 2008). Another problem is that state subsidies should be accompanied by management courses in order to really help farmers to start their businesses. Adams (ibid: 188), for instance, asserts that "some funds have been offered to farmers for on-farm hospitality, but when the farming families know nothing about the hospitality business, a disaster is waiting to happen".

On the other hand, German farm tourism shows more professionalism in the designing of quality labels that have gained national visibility. This is of paramount importance in unlocking the "hidden potential" consistently identified in the annual national report of the German government (BMELV, 2006). In order to reduce the dependency from families, farm tourism associations have tailored farm tourism activities to the need of new market segments (seniors, handicapped, etc.). Furthermore, in some regions they collaborate with national health insurance institutes and other external contractors (Neu, 2007). Finally, in order to professionalize the marketing knowledge of farm operators, they organize management seminars with business education institutes (ibid.). Table 1 gives an overview of the main differences between German and Italian farm tourism.

Table 1 about here

If the differences between German and Italian farm tourism are notably, so are the similarities. In both countries, farm tourism operators have been pursuing high differentiation within the tourism industry in order to attract new customer segments. Thus, as stressed by

many researchers, these days successful tourist products are designed following the main principles of the "experience economy" described by Pine and Gilmore (1999).

Following their approach, not only should a tourist product be characterized by excellent products and services, but, even more importantly, it must have the ability to create a memorable impression on the customer "experience set".

Roosen (2008) explains the implementation of the experience approach in the case of farm tourism. The sole provision of farm lodging for guests, which is typical of the first phase of the evolution of farm tourism, constitutes the core of the farm tourist product (see Figure 1).

Figure 1 about here

Examples of the first level can still be found in Italy, especially in farm operations located near seaside resorts and/or cultural cities (such as Florence and Venice). This form is also still predominant in some German states (above all, eastern Germany) which, according to Nilsson (2002:10), can be explained by the strong relationship between farm tourism as a form of social tourism and the Marxist concept of socialization as one of the state's main duties.

At the second level, the offering to the tourist is enriched by additional products or services with the purpose of compensating for the main deficits of tourist products. These, according to the current literature on tourism (cf. Hill & Busby, 2002; Kotler, Bowen & Makens, 2003; Matthes, 2008; Shostack, 1977), are the following:

- Immateriality: in contrast with a physical product, the quality of a holiday cannot be tested in advance.
- Inseparability: the production and the consumption of a tourism product are simultaneous.
- Integrity: the host is part of the holiday process/experience.
- Quality fluctuations: unlike physical products, the intrinsic features of holidays are of an intangible nature and therefore unstable. Thus, a zero defects policy should be pursued.

Thus, both in Italy and in Germany, farm operators have tried to add transparency to their leisure supply. In Germany, for instance, quality certification labels attempt to correct the information asymmetry caused by the fact that farm tourism is not yet very well known among the German population. In a similar way, the Italian law dedicated to farm tourism

helps farmers gain visibility in the market by distinguishing themselves from other tourism providers.

Next, on the third level, tourist products are designed with the purpose of shaping customers' memories, which in themselves become tourism products (cf. Pine & Gilmore, 1999; Schulze, 1992). Thus, at this level, the farm holiday is highly personalized to the needs of customers who are pursuing not merely a farm holiday but a farm holiday *experience*. In fact, both German and Italian farm operators have been working on several ways of adding value to their offer, focusing on the experience of farm tourism consumption. An example of this is the "adventure farm" quality label (Erlebnis Bauernhof) recently developed by the German association of farm tourism (BAG), in which farm operations cluster a range of varied activities designed to generate not only satisfaction but also enthusiasm among their guests. For instance, some farm operators encourage farm guests to plant their own seedlings during their holiday (such as trees) and regularly return to reap their own harvests.

In the following section, the "experiential" dimension of Italian and German farm tourism products will be further analyzed within the conceptual framework of Quan and Wang (2004). To this end, the differentiation patterns of farmers discussed above will serve as a point of departure for our study.

1.3 Conceptual framework of the comparative study

According to Quan and Wang (2004), there are multiple ways of interpreting the tourist experience. As depicted in Figure 2, this can be considered either an experience that is in sharp contrast to the tourist's everyday life or one that is an extension of it (ibid.: 297).

Figure 2 about here

For the former, the authors use the label "peak touristic experience" and provide exotic tourism as an example. Here, experiencing the attraction constitutes the major motivation for tourism. A "supporting consumer experience" is, in contrast, an extension of the tourist's daily life. Here, Quan and Wang (ibid.) refer to the "experiences of gratifying basic consumer needs, such as eating, sleeping and transport". The authors state that neither peak nor supporting consumer experiences can be regarded as separate dimensions because they are mutually dependent. So, for instance, if the basic needs of tourists are not fulfilled, the greatest attraction may still cause disappointment for customers and vice versa.

Another important issue is the interchangeability of the two dimensions of "peak touristic experiences" and "supporting consumer experiences". Thus, a basic need, such as food, can

turn a holiday into a peak experience. Similarly, a love affair can turn a mass-market sun-and-beach holiday package into a memorable consumer experience (ibid.).

A literature review clearly shows that the experiences provided by farm operations in the two countries differ greatly. For instance, in Italy food consumption, a supporting consumer experience, has turned into one of the main attractions of farm tourism and nowadays represents a peak experience (ARM, 2003). As discussed above, the creation of agrarian routes, such as the Chianti route, has provided an opportunity for farmers and food producers to add value to their agricultural products (Brunori, 2003). Furthermore, as each Italian region is rich in vernacular foods, which are at least to some extent protected by the PDO and PGI European labels, food-related events (Italian *sagre*) contribute to the promotion of farm tourism as well as food tourism (ibid.). Other peak experiences such as children-related activities or sport activities are, in contrast, not as much widespread as food related activities (above all catering and sampling). On the other hand, the diffusion of swimming pools and wellness related infrastructure such as saunas seem to indicate that guests highly value these services which can be considered supporting consumer experiences.

In contrast, in Germany food marketers have only recently begun to catch up with the process of rediscovering food-related traditions as confirmed by the low number of registered PDO and PGI German food labels (Spiller, Voss & Deimel, 2007). This situation is also reflected in the supply structure of German farm tourism, where self-catering (except for breakfast) is the norm (Nilsson, 2002).

On the other side, the large amount of quality labels that German farm operations have designed in order to segment the market clearly show that farmers are moving towards a demand orientated approach (Clarke, 1996). Furthermore, if we examine the quality labels in which farm operators invest a large amount of money as a proxy for the willingness of farm guests to pay, we can distinguish among labels with an emphasis for “peak touristic experiences” such as child-related activities, horseback riding, etc. as well as labels with a focus on “supporting consumer experience” such as the star provision system of the German tourist association (DTV) which assesses the quality of the farm facility.

All told, we have theoretically shown that the experiences provided by farm operations to their guests in the two countries differ greatly. In the following we will try to empirically test these assumptions and we will use an econometric model in order to analyze which type of attributes is valued at most in the willingness to pay for farm tourism. We therefore present our research question as it follows:

- Do the differentiation patterns among Italian and German farm operators greatly differ and, if yes, in which attributes?

1.4 Procedures

1.4.1 Research design and data collection

In the following, both an Italian and a German sample of farm operators are described by using descriptive statistics in order to detect the differentiation patterns in the two countries. Next, two hedonic price models will be presented to analyze to which extent the features of farm operators in both Italy and Germany influence prices of farm based apartments. Thus, for the hedonic price models only those farmers who lodge tourists on apartments are included. The focus on this group of farmers is due to the fact that in the last years farm operators have shown an increasing tendency to invest on this kind of accommodation. In fact, apartments are a sound investment both for farmers, because this type of accommodation is less time consuming, and for tourists, as the average price per person of apartments is lower than that of rooms.

For both the Italian and the German models the digitalized catalogues of the German publisher Landchriften-Verlag are used. This company specializes in publishing catalogues for Germans interested in farm holidays either in Germany or abroad.

Overall, the Italian data set consists of 365 records of farm operations, whereas the German data set includes 1,445 units. Out of these, 193 Italian farmers and 686 German farmers lodge their guests on apartments. The analysis was carried out in 2008 (May-October) with the financial support of the DAAD-Vigoni Program.

1.4.2 Methods

The application of the hedonic price method to tourism studies is common since it has the advantage of being applied to a real market than a hypothetical (Anderson & Hoffmann, 2008; Khalil, 2004). A classic example is the fact that two otherwise identical houses will be priced differently depending on the characteristics of their locations (Van Huylenbroeck et al., 2006: 15). The relationship can be found by regressing the price of the marketable good on a number of independent variables (ibid.).

In the following, the log-linear model is used:

$$\log P = b_1 + b_i X_i$$

The dependent variable in both models is the price per apartment (€/night/accommodation) which is regressed on characteristics linked to accommodations or guests' activities. The results of the two analyses estimate the influence of the characteristics included in the models on the price. This influence is measured as the percentage change in the logarithmic price scale when the independent variable changes by one unit (Van Huylenbroeck et al., 2006: 15).

1.5 Results

1.5.1 Description of the samples

Italy: The majority of accommodations (48%) are located in central Italy (with a high concentration in the Tuscany region), followed by 29% located in northern Italy, 13% in southern Italy and 10% on the islands of Sicily and Sardinia.

Table 2 about here

Germany: The majority of farm operators are located in the western states of Germany. Among these, Bavaria is the state with the highest concentration (27%), followed by Schleswig-Holstein and Baden-Württemberg (both 15%). In the eastern German federal states, around half the operators are established in Mecklenburg-Western Pomerania (3%). Table 3 provides an overview of the geographical distribution of German farm operators.

Table 3 about here

Table 4 compares the degree of differentiation attained by German farm tourism operators with that achieved by Italian ones. Italian farm operators display a higher degree of specialization in the following differentiation patterns: direct selling of farm produce (83% of Italian operators versus 37% of Germans), swimming pool (58% versus 21%), catering (53% versus 46%), handicapped services (42% versus 12%), organic farming (41% versus 12%), winemaking farm (48% versus 5%) and bicycle service (62% versus 55%).

Table 4 about here

In contrast, German farm operators are more differentiated than Italian ones in senior-orientated facilities (25% versus 1%), provision of apartments (91% versus 55%), one-night stays (87% versus 47%), pet accommodations (70% versus 53%), opportunity to work on the farm (69% versus 34%), horseback riding (62% versus 22%), farm tourism with winter sport activities (26% versus 4%) and particular child-related offers, such as children's playgrounds (91% versus 44%), services for unchaperoned children, (6% versus 1%), tennis (10% versus 1%) and provision of a sauna (22% versus 4%).

In the farm tourism literature, practitioners point out the growing importance of so-called micro-niche differentiation patterns (Hassan, 2000; Stone, 2005), such as business or fishing farm tourism. The analysis also provides some results concerning these micro-niches. German farm operators perform better in the following specialization patterns: fishing farm tourism (17% versus 3%), hunting (9% versus 5%), business (18% versus 5%), camping (19% versus 10%).

All in all, it appears that Italian and German farm operators have often chosen divergent differentiation paths: the former investing more in catering and selling farm produce and the latter in child- and senior-orientated facilities as well as some sport and fitness services.

1.5.2 Results of the hedonic price models

In the following hedonic price models, all the pertinent explanatory variables, influencing rental prices are tested. Regardless of which variables are considered, the identification of the appropriate functional form constitutes the decisive step in estimating the hedonic model. Several functional forms were tested and compared (linear, semi-log, log-log). On the basis of the statistical significance of the coefficients and the suitability of their indicators, as well as the power of the parameters R and F, the best econometric results are obtained using the semi-logarithmic form. Using the coefficients of the estimated model, the implicit marginal price of each attribute is generated. The estimated coefficients and the implicit marginal price of each attribute are presented in the following.

Findings of the Italian model: Table 5 provides an overview of the findings of the regression analysis. The presence of a swimming pool has the strongest positive influence on the rental price. This is plausible, as in the last years the investments in this type of infrastructure has rapidly increased (ARM, 2003). Not surprisingly the location of the farm next to a cultural highlight (e.g. medieval village) has a positive influence on location price as well. On the contrary, the possibility to camping in the farm's garden influences the price negatively.

Table 5 about here

Findings of the German model: as depicted in Table 6, the greatest influence on rental price is depicted by the children playground. Furthermore, the presence of a wine-selling point has a positive and significant influence on price as well. Micro-niches specialization into hunting and fishing farms allows farm operators to set higher price, whereas both the allowance to bring one's own pet as well as the provision of a single-night stay have negative repercussions on the rental price probably due to the low number of guests who take into consideration these

offers and, consequently, the low level of revenue provided to the farm operation. Finally, the specialization as a horseback riding farm has a positive and significant influence on price.

Table 6 about here

1.6 Discussion

Based on the hedonic price method, the study presented in this chapter shows which characteristics significantly affect the rental price for both Italian and German farm operations. The findings show that the magnitude of the differentiation strategies adopted by farm operators varies within the two countries.

In Italy, for instance, differentiation strategies that recall farming traditions are not very meaningful for those farm operators who lodge guests on apartments. In fact, for these guests, other features which are more common to "conventional tourism" (e.g. swimming pools) seem to play a major role.

In addition, despite the increasing trend of farm operators (above all in southern Italy) of offering camping possibilities on their farms, this feature appears to affect rental prices in a negative way. This is probably due to the fact that two different types of tourists, the "relaxation seekers" and the "adventure aficionados" collide. Hence, it is essential that farmers are aware of these two guest segments. Since they have different travel styles, farmers may host them on the same farm but in different times of the year.

Regarding German farm operators, these show a more varied array of differentiation patterns, ranging from the direct selling of wine to the child-related specialization including a number of micro-niches. With regard to the former, this seems to be a very successful strategy. Especially in the Federal State of Rhineland Palatinat, where about 63% of all viticulture acreage is produced (Barten, 2007) as well as in Bavaria and Baden-Württemberg, notably known for the good quality of wine, winemakers could combine their farming activities with wine tourism. In addition, the resemblance of the landscape of these states (above all Rhineland Palatinat) with the stunning environment of the Italian region of Tuscany could work in favor of the further development of farm tourism. Farms with children-related services are, in contrary, equally widespread throughout the country. Our model shows that this farm specialization is a sound strategy as well. Mention should be made to the successful examples of the federal state of Northrhine-Westphalia where farmers have taken advantage of the funds of the European financial program labeled ELER in order to invest their resources and to position their farms towards this market segment (Hunke-Klein, 2008).

Finally, farms which offer fishing or hunting are examples of a flexible type of specialization which combines food-related features with sport activities.

1.7 Conclusions and limitations of the study

The study described in this chapter has empirically examined the differentiation patterns of Italian and German farm operators by means of two hedonic price models.

The results have shown that in both countries farmers have begun to sharpen their management skills in order to position their farms. Thus, as stated by Shakur and Holland (2000) the marketing component is being recognized as particularly important in the rural location due to the relatively unorganized nature of this industry.

Before concluding, we should point out the study's limitations. Since the two catalogues present different samples' sizes, the question of cross-country generalizability is germane. Closely related with the above is the low level of R^2 in both datasets. Finally, farmers of both samples belong to farm associations, which can be a bias, since, generally, these farmers are more committed than other farm operators who do not belong to any farm tourism association.

As a consequence, further research and the replication of findings with other samples are called in order to further increase the market knowledge of farm tourism in both countries.

1.8 Acknowledgments

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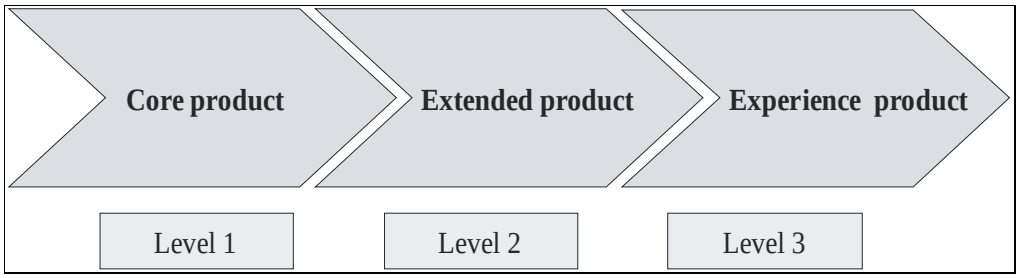
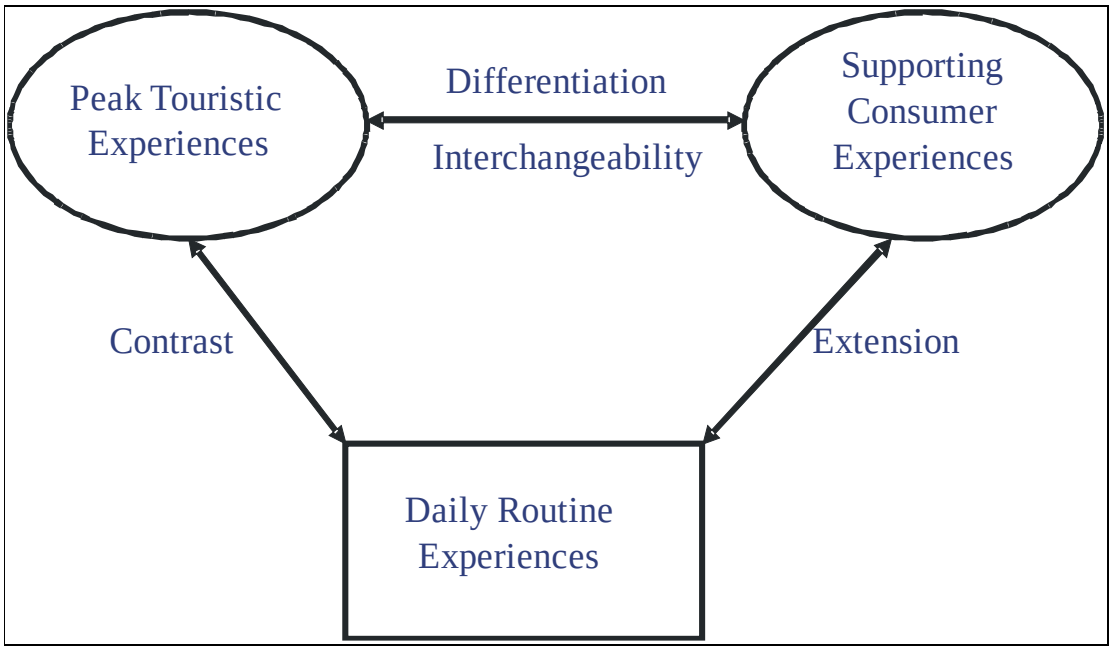
Figure 1 Levels of provision of farm tourism products



Source: own representation based on Roosen (2008)

Figure 2 The tourist experience model applied to farm tourism



Source: own elaboration adapted from Quan and Wang (2004)

Table 1 Comparison of the main differences between German and Italian farm tourism

Characteristics	German farm tourism	Italian farm tourism
Legal framing	Legal vacuum	Ad hoc law
Market segment	Dependency on large sized families	Varied target
Average age of operators (years)	48	50
Share agritourism farms : total no. farms	5%[1]	1%[2]
Average occupancy rate (nights)	Between 125-135	Over 200
Image	Not well defined, little known	Defined, positive, "tuscanized"
Quality certification	National level	Regional level
Share of international tourists	Low	High
Distribution channel	Low level of development	High level of development
Integration within the territory (cross promotion, tourist routes, etc.)	Low	High
Source: own representation based on [1]DBV (2009), [2]Garruti et al., 2003		

Table 2 Geographical distribution of Italian farm operators

Geographical location	n	%
Northern	104	29%
Central	175	48%
Southern	48	13%
Sicily and Sardinia	38	10%
Italy	365	100%

Source: own calculations

Table 3 Geographical distribution of German farm operators

German state	n	%
Berlin/Brandenburg	23	2
Mecklenburg-West. Pomerania	44	3
Saxony	34	2
Saxony-Anhalt	11	1
Thuringia	29	2
Baden-Württemberg	221	15
Bavaria	384	27
Hesse	66	5
Northern Saxony	199	14
Northrhine-Westphalia	115	8
Rhineland Palatinate/Saarland	104	7
Schleswig-Holstein	215	15
Germany	1,445	100

Source: own calculations

Table 4 Comparison among German and Italian farm operators

Characteristic	Italy	Germany
unchaperoned children	1%	6%
hunting	5%	9%
organic farming	41%	12%
vineyard	48%	5%
handicap services	42%	12%
tennis	1%	10%
fishing	3%	17%
business	5%	18%
sauna	4%	22%
camping	10%	19%
swimming pool	58%	21%
seniors	1%	25%
winter sport	4%	26%
selling own produce	83%	37%
catering	53%	46%
horseback riding	22%	62%
work possibilities	34%	69%
bicycle service	62%	55%
table tennis	0	70%
pets	53%	70%
children playground	44%	91%
one night	47%	87%
apartment on the farm	55%	91%
wine direct selling	n.a.	10%

n.a. = not available

Source: own calculation

Table 5 Influence of variables on the rental price (Italian model)

Results of the regression analysis			
Number of observations	193		
Adj. R^2	0.08		
F value	6.270 ($p<0.001$)		
Independent variables	St. beta value	t-value	p
Intercept	4.37	69.16	.00
Swimming pool	.16	2.51	.01
Cultural highlight	.14	2.34	.02
Camping	-.21	-2.52	.01
Dependent variable: log price apartment/night			
Log-Likelihbood = - 84.9723 Akaike Information Criterium = 179.945 Schwarz' Bayes-Criterium = 196.258 Hannan-Quinn-Criterium = 186.551 Source: own calculation			

Table 6 Influence of variables on the rental price (German model)

Results of the regression analysis			
Number of observations	686		
Adj. R^2	0.08		
F value	8.41 ($p<0.001$)		
Independent variables	St. beta value	t-value	p
Intercept	3.53	74.68	.00
Children playground	.11	2.55	.01
Wine direct-selling	.10	2.51	.01
Hunting	.09	2.61	.01
Fishing	.08	2.74	.01
One-night stay	-.08	-3.05	.01
Pets	-.07	-3.36	.00
Horseback riding	.07	3.34	.00
Dependent variable: log price apartment/night			
Log-Likelihbood = -57.3085 Akaike Information Criterium = 130.617 Schwarz' Bayes-Criterium = 166.864 Hannan-Quinn-Criterium = 144.642 Source: own calculation			

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