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EVOLUTION OF RURAL TOURISM IN PORTUGAL: A 25 YEARS ANALYSIS

Tourism is Rural Areas (TRA) is seen as an important instrument to ensure economic development of underprivileged rural areas and has the potential to improve the living conditions of poor rural communities. The main objective of this paper is to provide a characterization of the Portuguese TRA market and analyze the evolution of rural tourism supply and demand and its relation with economic development. This study shows that the number of TRA accommodation units in Portugal has been growing continuously over the last 25 years, despite some fluctuation in demand, especially from foreign tourists, and the constant low level of occupancy. No significant changes were found in the structure and geographical distribution of TRA units in the period under analysis. We conclude that the high geographic dispersion of establishments does not contribute significantly to the economic development nor does it help with the development of common marketing strategies.

Keywords: Tourism, rural areas, evolution, Portugal

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Introduction

The expansion of Rural Tourism is a trend that is common to most countries in Europe (Cánoves et al, 2004). In Portugal, over the last decades, rural tourism (RT) has also risen to become an important economic activity in several rural areas. The development of rural tourism in Portugal is the result of the profound changes in society in general and in the rural world in particular, which requires new developments to be pursued through diversification of activities. Also decisive to this development have been the changes in tourism consumer behaviour with respect to travel preferences and motivations (Yagüe, 2002; Aguiló & Juaneda, 2000; Hummelbrunner and Miglbauer, 1994).

The appeal of rural areas for tourism and recreation lies firstly in their intrinsic rural characteristics (Kastenholz, Davis & Paul, 1999; Sharpley and Sharpley, 1997). However, like urban or seaside tourism, the appeal of rural tourism lies also in the range and quality of attractions and facilities (Pina and Delfa, 2005).

The aim of this paper is to present an outlook of the evolution of the demand and supply in Portuguese rural tourism market between 1984 and 2008, by region and accommodation type.

Roots and Typology of Rural Tourism in Portugal

Rural tourism is a recent phenomenon in Portugal. Officially, it appears in 1978 with the publication of the Regulatory Decree no. 14/78 dated 12 May 1978. However, it was only after the publication of the Decree-law lei no. 423/83 that the rural tourism really grew in Portugal. At an early stage Rural Tourism was based nearly exclusively on lodgings: rooms rented in the owner's private home. The purpose of these activities was to complement incomes from agriculture and did not represent a threat to the main agricultural activity (Cavaco, 1995). In a second stage the product evolved from simple accommodation to more diverse and specialized services and structures, following a strategy to capture a more diverse and demanding clientele and to encourage repeat visits.

To understand Portuguese TRA we have also to understand who the owners are. A study by Silva (2006) points to the existence of three different groups of owners. A first group is linked to traditional and noble families who join the activity mainly to keep and recover old family properties, especially palaces and manor houses. A second group consists of farmers that seek to make some money from agricultural facilities, such as barns and small farmhouses. Finally, individuals who buy and restore old houses in traditional villages to use in touristic activities compose the third group. Many people saw TRA as an opportunity to restore family houses with government support and at the same time create an alternative way to earn some extra income, although a good number of them did not hold a real interest in TRA activities.

This may explain that one of the main driving forces behind the development of rural tourism in Portugal was the support of government funds to restore old houses in different regions. In Portugal, as in the rest of Europe, Rural Tourism was seen as a good solution for the European family agriculture crisis during the 1980s, through the development and diversification of new economic activities in rural areas. In some cases, the new activities competed directly with existing ones, which were not, however, of an agricultural nature. In other cases, the specialization associated with rural houses was to offer attractions related to specialized agricultural products, such as the vineyards of the Douro valley in Portugal for the production of Oporto wine.

The concept of rural tourism depends mainly on the products offered. Rural Tourism is known for the familiar hospitality by the owners of the lodging houses. Currently, the rural accommodations in Portugal are distributed among the following modalities: Agrotourism, Country Houses, Rural Hotels, Village Tourism, Habitation Tourism and Rural Tourism.

Methodology

The research method used was the analysis of secondary data sources from national statistics and government departments. Historical data for the 1984-2008 period was collected in order to analyze the evolution of rural tourism offer and demand in Portugal. The data included information on the total number and geographic distribution of establishments, rooms and beds. For two years (2000 and 2001) data for some variables (for example number of establishments by type of accommodation) was missing, thus restricting the analysis to the remaining years.

Furthermore, due to differences in the classification system, data must be divided into two periods: before and after 1999. The present classification system was introduced in 1999 and since the new classification system is vastly different from the previous one, 1984-1998 data are not comparable with those available for 1999-2008. To make data comparable, when appropriate, the geographic distribution and type of establishment classification for the 1984-1998 period were reclassified and data aggregated according to the new classification scheme. Where it was not possible to obtain comparable data the results are presented in separate tables.

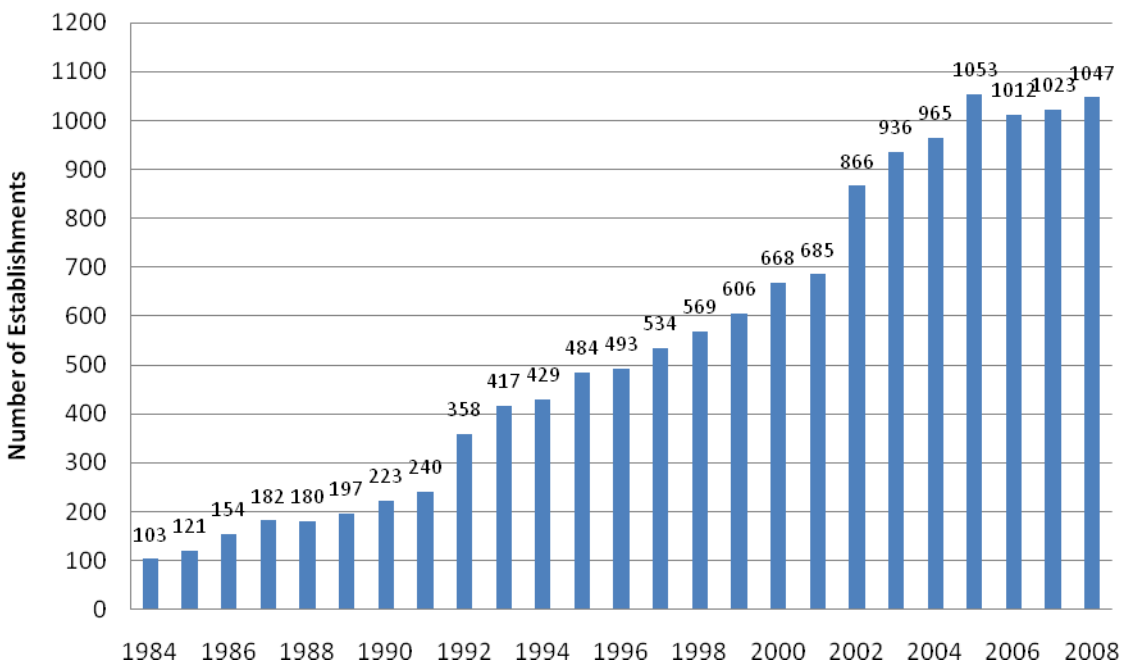
The Evolution of the Rural Tourism Market

Mass migration from rural to urban areas in Portugal, came much later than in most industrialized European countries and despite being regulated since 1978, Portuguese Rural Tourism has only experienced considerable growth over the last 25 years. Even the first official statistics dated only from 1984.

As can be seen in Graphic 1 the number of rural tourism establishments has grown steadily since 1984, however as would be expected the rate of growth has been declining from 14% between 1984 and 1989 to about 13% in the 1990s and 7% in the current decade.

In the 1984-2008 period the average rate of growth was 10.7% per year. To this rate of growth, the 1990s were especially important. It could be said that a new tourist product was created in this period, with new parameters, ranging from higher quality premises and services, the provision of attractive and imaginative complementary leisure activities at competitive prices, which attracted a completely new type (segment) of consumers. The growth of rural tourism offerings may also be attributed to changes in the demand and in patterns of leisure time, the segmentation of holidays and the increase of long weekend trips.

Graphic 1 – Evolution of rural tourism establishments



Source: Direcção-Geral do Turismo (2000-2009), INE (2008)

Looking at the geographic distribution of establishments (Table 1 and

Table **2**) it is evident that they are not uniformly distributed throughout the country. The north region alone accounts for almost half of the total number of rural tourism establishments.

Together, the north, centre and Alentejo regions represent 82% of the of the entire Portuguese rural tourism market.

Table 1 – Geographic distribution of establishments (1984-1998)

	Green Coast	Silver Coast	Mountains	Lisbon Coast	Prairies	Algarve	Azores	Madeira
1984	32.0%	4.9%	38.8%	7.8%	12.6%	3.9%	-	-
1985	33.3%	4.2%	40.0%	5.8%	13.3%	3.3%	-	-
1986	(a)	(a)	(a)	(a)	(a)	(a)	(a)	-
1987	(a)	(a)	(a)	(a)	(a)	(a)	(a)	-
1988	38.9%	10.6%	9.4%	20.6%	17.2%	3.3%	-	-
1989	17.1%	5.8%	4.1%	10.4%	61.3%	1.4%	-	-
1990	37.2%	14.3%	8.5%	21.5%	14.8%	3.1%	0.4%	-
1991	36.3%	14.2%	9.2%	21.7%	15.4%	2.9%	0.4%	-
1992	34.6%	10.3%	8.1%	26.8%	16.5%	3.4%	0.3%	-
1993	35.0%	9.8%	8.9%	26.9%	16.3%	2.9%	0.2%	-
1994	36.4%	9.1%	7.7%	28.0%	15.6%	3.0%	0.2%	-
1995	34.1%	9.7%	7.6%	28.1%	17.4%	2.9%	0.2%	-
1996	35.5%	9.7%	6.9%	26.8%	17.4%	3.4%	0.2%	-
1997	33.7%	10.1%	6.0%	27.0%	19.7%	3.4%	0.2%	-
1998	32.5%	9.1%	5.6%	25.5%	17.9%	3.0%	3.0%	3.3%

Source: Direcção-Geral do Turismo (2000)

(a) Not available

Table 2 – Geographic distribution of establishments (1999-2008)

	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
North	43.2%	41.0%	41.3%	43.0%	44.0%	44.5%	43.8%	44.5%	43.8%	43.8%
Centre	19.5%	19.5%	19.3%	25.2%	25.3%	24.9%	23.2%	21.7%	21.9%	22.2%
Lisbon	16.2%	14.4%	13.9%	3.9%	3.5%	3.2%	2.7%	2.6%	2.6%	2.6%
Alentejo	13.9%	12.6%	13.1%	14.9%	15.1%	15.0%	15.8%	16.1%	15.8%	15.9%
Algarve	3.0%	2.8%	2.8%	2.8%	2.5%	3.1%	2.9%	3.0%	3.0%	3.1%
Azores	2.5%	5.2%	5.1%	5.5%	5.1%	4.9%	7.0%	7.3%	8.0%	7.8%
Madeira	1.8%	4.5%	4.5%	4.7%	4.5%	4.5%	4.7%	4.8%	4.8%	4.7%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Source: Direcção-Geral do Turismo

Somehow confusing is the abrupt decrease in the percentage of establishments in Lisbon. We attribute this unexpected variation to changes in region boundaries, since the reduction was similar to the increase in the Centre region.

Data concerning the number of accommodations by type was only available after 1989 (Table 3). In addition, some problems were encountered. For example, data for 1999 was inconsistent and, therefore unreliable and data for 2000 and 2001 could not be found. At the same time, the classification system also changed in this period, so the analysis and conclusions drawn must take these constraints into account.

Table 3 – Number of establishments by category from 1989 to 1999

	Habitation Tourism			Rural Tourism			Agrotourism			Not classified	
	Estab.	%	Var.	Estab.	%	Var.	Estab.	%	Var.	Estab.	%
1989	107	54.3%		72	36.5%		10	5.1%		8	4.1%

1990	112	50.2%	4.7%	86	38.6%	19.4%	18	8.1%	80.0%	7	3.1%
1991	119	49.6%	6.3%	94	39.2%	9.3%	20	8.3%	11.1%	7	2.9%
1992	147	41.1%	23.5%	157	43.9%	67.0%	49	13.7%	145.0%	5	1.4%
1993	155	37.2%	5.4%	188	45.1%	19.7%	71	17.0%	44.9%	3	0.7%
1994	167	19.5%	7.7%	187	21.8%	-0.5%	75	8.7%	5.6%	429	50.0%
1995	177	18.3%	6.0%	219	22.6%	17.1%	88	9.1%	17.3%	484	50.0%
1996	181	18.4%	2.3%	214	21.7%	-2.3%	98	9.9%	11.4%	493	50.0%
1997	198	18.5%	9.4%	235	22.0%	9.8%	101	9.5%	3.1%	534	50.0%
1998	213	18.7%	7.6%	248	21.8%	5.5%	108	9.5%	6.9%	569	50.0%
1999	214	35.3%	0.5%	262	43.2%	5.6%	115	19.0%	6.5%	15	2.5%

Source: Direcção-Geral do Turismo

Despite all data constraints, a number of general trends are noticeable. From this**Error! Reference source not found.** it is clear that in general the number of establishments has been increasing continuously, however, in the last years, particularly after 2005, a slight reduction followed by stagnation can be witnessed. In the 2002-2008 period only the number of country houses grew continually from 116 to 246 (Table 4). Likewise, Rural Hotels show a steady increase in the 2006-2008 period, but this growth can be simply a result of newness and the notion that larger units are more profitable.

Table 4 – Number of establishments by category from 2002 to 2008

	Habitation Tourism			Rural Tourism			Agrotourism			Country houses			Village Tourism			Rural Hotel		
	Estab.	%	Var.	Estab.	%	Var.	Estab.	%	Var.	Estab.	%	Var.	Estab.	%	Var.	Estab.	%	Var.
2002	244	28.2%		358	41.3%		145	16.7%		116	13.4%		3	0.3%				
2003	246	26.3%	0.8%	391	41.8%	9.2%	147	15.7%	1.4%	148	15.8%	27.6%	4	0.4%	33.3%			
2004	247	25.6%	0.4%	406	42.1%	3.8%	146	15.1%	-0.7%	162	16.8%	9.5%	4	0.4%	0.0%			
2005	248	23.6%	0.4%	416	39.5%	2.5%	147	14.0%	0.7%	234	22.2%	44.4%	8	0.8%	100.0%			

2006	232	23.0%	-6.5%	387	38.3%	-7.0%	137	13.6%	-6.8%	229	22.7%	-2.1%	7	0.7%	-12.5%	18	1.8%	
2007	232	22.7%	0.0%	390	38.1%	0.8%	136	13.3%	-0.7%	234	22.9%	2.2%	7	0.7%	0.0%	24	2.3%	33.3%
2008	233	22.3%	0.4%	391	37.3%	0.3%	140	13.4%	2.9%	246	23.5%	5.1%	7	0.7%	0.0%	30	2.9%	25.0%

Source: Direcção-Geral do Turismo

Looking at the demand side (Table 5), it is clear that rural tourism only attracts a small proportion of foreign tourists visiting the country. This is an especially important issue since this market is aimed at middle and high income tourists who are willing to spend money during their holiday. Portuguese TRA owners need to improve their marketing efforts and strategies in order to try to capture a bigger share of foreign travellers, especially high-income ones.

Table 5 – Evolution of domestic and foreign Tourists' overnight stays

Tourists' overnight stays	2002	2003	2004	2005	2006	2007	2008
Domestic	236,991	211,804	177,793	241,092	268,673	367,313	292,401
Foreigner	260,513	241,362	211,528	211,396	248,380	297,155	231,058
% of domestic	47.6%	46.7%	45.7%	53.3%	52.0%	55.3%	55.9%
% of foreigners	52.4%	53.3%	54.3%	46.7%	48.0%	44.7%	44.1%

Source: Direcção-Geral do Turismo

It is important to note the inversion of the proportion of foreign and domestic tourist stays in TRA units between 2002 and 2008. The growth of the domestic market by 23% was sufficient to offset the 11% reduction in foreign demand. In 2008, the domestic market accounted for 55.9% of the overnight stays in TRA. Over the 2002-2008 period, the number of overnights stays increased 5.2% (from 236,991 to 292,401).

Table 6 - Tourists' overnight stays by country of origin

Country	2002	2003	2004	2005	2006	2007	2008
Portugal	236,991	211,804	177,793	241,092	268,673	367,313	292,401
Germany	77,608	93,732	63,478	71,040	70,974	75,457	57,970
Belgium					16,726	15,895	13,426
Brazil			902	4,354	1,114	2,262	3,151
Spain	21,906	18,336	18,534	15,867	29,141	38,462	33,033
EUA	18,409	12,365	13,279	9,036	14,254	13,856	12,143
France	21,971	23,706	18,000	20,416	21,396	25,072	20,375
Netherlands	27,109	20,102	18,272	17,539	27,312	45,259	28,811
UK	41,522	27,936	32,791	28,444	29,326	37,016	27,867
Others	51,988	45,185	46,272	44,700	38,137	43,876	34,282
Total	497,504	453,166	389,321	452,488	517,053	664,468	523,459

Source: Direcção-Geral do Turismo

Despite some efforts to the contrary, Portuguese TRA remains dependent upon its traditional markets. Germany, Spain, Netherlands and the UK, together account for 64% of total overnight stays. However, as can be noted from Table 6, the share of Spanish tourists' overnight stays has increased significantly from 2002 to 2008 and inversely German and British stays have declined.

Another problem and a significant challenge facing TRA is that occupancy levels remain very low. Over the 1984-2008 period the average occupancy rate varied between 9% and 19%. The best occupancy rates were achieved between 1999 and 2003, though it can be noticed that they have been generally increasing over the years (Table 7).

Table 7 – Average occupancy rates

Year	Average Occupancy Rate (%)	Year	Average Occupancy Rate (%)
1986	15.3	1998	11.6
1987	16.0	1999	19.0
1988	14.4	2000	17.9
1989	12.8	2001	18.2
1990	11.0	2002	17.5
1991	12.1	2003	14.7
1992	9.0	2004	12.2
1993	10.7	2005	13.6
1994	9.8	2006	14.3
1995	10.2	2007	17.8
1996	10.8	2008	14.8
1997	10.9		

Source: Direcção-Geral do Turismo

Occupancy levels vary depending upon the season, region and accommodation type. Rural hotels and country houses located in Algarve, Madeira and Lisbon normally achieve the highest occupancy levels during the summer season (July and August). These average occupancy levels can be very disappointing for motivated owners who had expected more from their business and in some cases are not enough to ensure financial viability. Two specific reasons can be pointed out for the low level of business. Firstly, the prices of accommodation are a little high, particularly when compared to room rates in standard hotels. Secondly, weather variation in Portugal might be the other reason explaining the low average levels of occupancy. The winter in the Centre and North of Portugal can be quite unpleasant leading to very low occupancy rates that tend to increase with the approach of summer. Not surprisingly, the warmest regions in the south are the ones with higher occupancy rates.

Despite the low occupancy rates, it was noticed that between 1999 and 2008 the average number of beds per establishment increased by 17.2% (Table 8). Alentejo, with an increase of 32%, was the fastest growing region, but other regions, like Centre and Lisbon, also grew more than 20% during the same period.

Table 8 – Number of beds per accommodation unit

Region	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	Var%
North	9.1	9.2	9.2	9.6	9.7	9.9	10.1	10.7	10.6	10.5	15.4%
Centre	9.3	9.2	9.3	10.1	10.3	10.5	10.5	10.7	11.2	11.4	22.6%
Lisbon	10.2	10.3	10.3	10.6	10.1	10.7	10.6	10.8	12.4	12.4	21.2%
Alentejo	10.0	9.9	10.0	11.0	11.2	11.4	11.3	12.3	13.0	13.3	32.0%
Algarve	10.9	10.9	10.9	10.3	10.5	10.7	10.7	10.8	11.8	11.8	7.6%
Azores	7.7	8.4	8.4	8.0	8.0	7.7	7.9	7.9	8.3	8.3	7.7%
Madeira	10.9	8.3	8.5	8.8	9.1	9.2	9.8	10.3	12.2	12.2	12.1%
Average	9.5	9.4	9.5	9.9	10.0	10.2	10.2	10.7	11.1	11.2	17.2%

Source: Direcção-Geral do Turismo

Discussion and Conclusions

The first conclusion to be drawn from our examination of the evolution of rural tourism in Portugal is that in the last 25 years the number of accommodations has been continuously growing. The North of Portugal, were Rural Tourism was first developed through a group of pilot projects in the Lima Valley, accounts for almost half the number of accommodations, followed by Centre and Alentejo regions.

Still at the supply side, the current analysis provides us with information, which could assist the design and coordination of public policies and the implementation of cooperative strategies among owners associations. There are various associations devoted to promoting rural tourism, however by themselves none is big enough or has the resources needed to efficiently negotiate with tourism agencies and operators.

Furthermore, many rural accommodation owners in Portugal are not members of any existing associations, which weakens the power of existing associations. The difference in owners' characteristics and objectives pointed out by Silva (2006), in addition to the low level of partnership, the lack of institutional collaboration, and the lack of a strong association may explain the absence of ability to design and execute a robust strategy. This is a key challenge to be addressed.

Despite the growth in the Portuguese rural tourism accommodation market, tourism has failed to attract its fair share of tourists. The average occupancy rates are still very low, possibly compromising the economic viability and sustainability of many TRA projects failing to meet the objective of stimulating the development of rural areas. In addition, the relatively high geographic dispersion of establishments with just one or two per village in most of the cases, does not contribute significantly to the economic development of the region.

At the demand side, some instability in foreign demand can be spotted. The number of tourists from traditional markets such as Germany and UK has been declining, luckily, the growth of the domestic market was sufficient to make up for the reduction in foreign demand. This final point calls for a deep reflection concerning marketing, customer behaviour and product development to help rural tourism designing a variety of marketing strategies and programs tailored to address the specific needs of both the domestic and foreign market.

In conclusion, we think that despite the growth of Portuguese TRA in terms of the number of accommodations, much remains to be done in order to strengthen the industry and make it more attractive to tourists. Owners associations should work together to identify potential areas for improvement and the expansion of marketing strategies.

Limitations

As with any research technique, the methodology used in the current study has its limitations. Because this study is based on secondary data, the inherent limitations of the secondary data is one major limitation. The data published by Direcção-Geral de Tursimo only cover the number of establishments, beds and overnight stays, as well as their geographical distribution. Although available measures were sufficient to address one facet of the evolution of rural tourism, more complete and accurate data on rural tourism is needed to evaluate other dimensions. Indeed, the use of only one dimension is perhaps the main limitation of this study.

We acknowledge that the current analysis is incomplete because rural tourism cannot only be defined by the accommodation capacity. However, the data available did not include additional variables for a more detailed and complete analysis of the rural tourism industry. These limitations clearly point to the need for additional research to fill data gaps and supplement the available information with data on important missing indicators on Rural Tourism.

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