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**EOGRAFIA ACTIVA**

DESENVOLVIMENTO LOCAL,  
AMBIENTE,  
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SUSTAINABLE TOURISM CLUSTERS:  
THE CASE OF ALENTEJO NATURAL PARKS

1. TOURISM IN PORTUGAL

Tourism is one of the most important sectors in Portuguese economy. It represents 11% of the GDP and 10% of total employment (2006). According to the World Wide Travel and Tourism Council (WTTC, 2005), tourist demand grew more than 5% in 2005 and the yearly expected growth rate until 2015 is 4.1%. The large majority of tourists visiting Portugal come from Europe, followed by the United States. The United Kingdom contributes with more than 20% of the total. Germany comes second with 11% and Spain with 7%. The French represent only 3.2%. Over the last few years, the bed occupancy rate originated from the UK and Germany has decreased, but a significant increase in the number of Spanish and Portuguese, maintain a raise in the final numbers. The Algarve region is the most popular destiny with approximately 39% of total bed occupancy, followed by Lisbon with 20.5% and Madeira with 16%. Alentejo region represents only 2.9% of the total. Despite a considerable growth in the last few years, this region maintains a low attraction potential. When it comes to the tourists annual distribution, the weaker period is registered between November and February and the strongest between July and September. Alentejo tourism is oriented towards the internal market (the same happens with the North, Centre and Azores regions). The other regions are oriented towards the external markets: Algarve, Lisbon and Madeira. Bed occupancy rate in Alentejo scores 29.9%, below the national average (38.6%), but above the Centre and the North regions.

Despite the fact that Alentejo has the lowest hotel capacity of all Portuguese regions, when Rural Tourism is concerned, the region rates second with 145 establishments, next to the North region. Just to permit a comparison, let's say that Algarve has 30 registered establishments of this kind and the Azores 47. When it comes to nature tourism, it is obvious the existence of a strong relation with the rural tourism infrastructures mentioned above. Statistics also show that the number of lodging-houses (or country-houses) is the highest of all the regions in Portugal. These numbers reveal the identity of Alentejo: rural with a bias towards a more quite and elitist demand, which avoids crowds and prefers the quietness of the country. The beautiful and more untouched landscapes, its rural origins and one of the lowest tourist densities among Portuguese regions created an "atmosphere" for the investment. Over the last few years, national and international investors became

more visible and larger projects are growing, namely around the Alqueva Lake in the eastern part of Alentejo.

## 2. ALENTEJO PARKS AND NATURAL RESERVES

The Portuguese Institute for Nature Conservation and Biodiversity (ICNB) defines “Natural Parks” as “national interest areas containing natural and semi-humanized landscapes and consistent examples of the integration of human activities and nature, which shows samples of a natural region”. Natural Reserves are “areas for the protection of flora and fauna”, fully integrated in demarcated areas for protection, within the protected areas, “to maintain the natural processes in undisturbed state”. Marine reserves are areas in demarcated Protected Areas to ensure marine biodiversity.

The various plans of Nature Tourism for Reserves and Parks highlight the natural features as the major potential for this type of tourism: geographical location and natural environment; historical and cultural heritage; fairs; festivals and pilgrimages; sun and beach; nature watch; walking and sports of nature; thematic routes; museums; crafts, food and wine; and last but not the least, tourist accommodation.

## 3. PORTER “DIAMOND” MODEL

In the beginning of the 80’s Porter proposed the existence of geographical concentrations where growth was strong and sustained by the interactions among private, public and institutional actors. Its functioning was schematized through the famous four diamond points:

- Factor conditions – The structural environment elements like natural resources, workforce, infrastructures, institutions and universities. Among the main production factors, quality is the first issue for the cluster development framework.

- Demand conditions – Conditions for products. Through its analysis firms preview the foreseeable evolution of markets and try to scope the consumers’ desires. Demand stimulates innovation, the search for new production methods and the climb along the value chain.

- Related industries – The activities that offer other products and services, but that to a similar demand, can interact both with the client or the firms’ cluster. Geographical proximity enhances the exchange of ideas and innovations benefits.

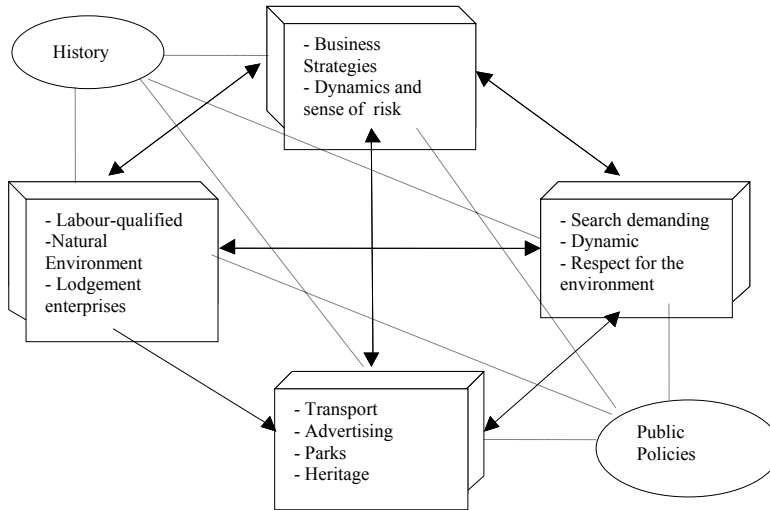
- “Strategy, structure and rivalry” – the existence of local competitors is a powerful stimulant to innovation and performance improvement. But – when needed – cooperation among firms can also reveal itself as a determinant factor.

In order to complete the diamond systemic nature, Porter still included two external factors to the cluster: historical hazards and public policies.

This idea should be analysed in a systemic way, as the effect on one of the four main elements depends from the others’ state. Interactions inside the cluster are mainly informal, enticing coherence: all actors favour the cluster (cooperation), but keep their freedom of choice in all business opportunities (competition). The detailed examination

of each and one of the diamond points is a practical guide (through enquiries, interviews and statistical analysis) to carry out a SWOT analysis of a particular cluster for tourism.

Figure 1 - The Porter “Diamond” Model applied to Tourism in Protected Areas



Source: Authors, 2009.

#### 4. INQUIRIES RESULTS ANALYSIS

##### 4.1. Introduction

Aiming at the assessment of sustainable tourism's importance in Alentejo (Portuguese region), we conducted a series of telephone surveys to several lodgement enterprises operating in the ten municipalities of Alentejo who have areas integrated in Natural Parks. From the 104 contacts established, only 59 were effectively conducted. Therefore, that is the total number of contacts used in this particular study. The survey applied was rather synthetic. In order to avoid incoherencies and doubtful interpretations in the final treatment of the inquiries' results, we privileged the use of closed questions, more objectively and synthetically treatable. The inquiry was structured in seven different thematic domains: (i) Firms identification; (ii) Suppliers;(iii) Employment; (iv) Supportive sectors; (v) Strategy, structure and competition among the companies; (vi) Client Markets; (vii) Public Politics. To assess the users' profile of Alentejo nature tourism, an application of a questionnaire was carried through in the units classified and licensed by the natural areas municipalities. The questionnaire - synthetic, with a majority of closed answers, helping in the results treatment – was carried out in the “five natural areas”

A total of 152 surveys were conducted and distributed as follows: São Mamede Mountain Natural Park (SMMNP) - 48; Southwest Alentejo and Vicentin Coast Natural

Park (SAVCNP) - 34; Guadiana Valley Natural Park (GVNP) - 37; Sado Estuary Natural Reserve (SENR) - 9; Santo André and Sancha Lagoon Natural Reserve (SASLNR) - 20. The five Natural Parks were also contacted both through mail and telephone but only two answered on time: Sado Estuary Natural Reserve and Southwest Alentejo and Vicentin Coast Natural Park. The three inquiries are carried out jointly, following the Porter model adapted to sustainable tourism, as mentioned above.

## 4.2. Factor Conditions

### 4.2.1. Firms Identification

The inquiries presented show some pertinent information. Approximately, 91% of the 66 inquired firms are “independent entities” (53). About 7% are integrated in a national group (“Pousadas de Portugal”, “Teixeira Duarte” or “Acqua Hotel”) and only 2% belong to an international group (the “Best Western Hotels”). In what relates to the funding distribution, with the exception of “Pousada de Santa Clara” (in Odemira), all the inquired firms are supported through national private funding.

### 4.2.2. Employment

The great majority of the lodgement units – specially the smaller ones, functioning as Rural Tourism – use a multitask approach to their employees. That’s specially the case in the cleaning services (around 90% of the sample) and in the marketing, promotion and publicity (82%). There is great variability in the number of persons working in the lodgment units. Therefore, the average number (8 persons) does not reflect properly the founded disparity. Bigger units (Hotels and Hostels) employ a higher number of persons, whereas small Rural Tourism units employ not more than two or three persons. Almost half of the employees (46%) do not present any kind of training in the job performed. It’s particularly the case of those working in areas such as cleaning or kitchen activities. Normally, the small businesses are organized as little family businesses. Even so, approximately  $\frac{1}{4}$  of the people working in the lodgments can be considered as specialized personnel. The survey also showed that 60% of the businesses owners or director managers have a high level of education (graduate level). The remaining 40% have an undergraduate level (medium degree education).

## 4.3. Demand Conditions

We concluded for the total of natural areas that 73% of the clients are Portuguese, 5% belonged to the region and 22% were foreigners. On an individual analysis, at SENR all the inquired people were Portuguese. SMMNP and SAVCNP were the two parks where the percentage of foreigners was higher. In what gender is concerned, 59% of the inquired were men and 41% women. The SENR presents 56% of women and RNLSAS contains the lowest number of women, only 30%. The remaining natural areas follow the average. The inquired average age is 46 year and in all the natural areas the age is around the 40 years old, except for GVNP for 52 years old. The inquired occupations are extremely varied, with primary focus on teachers, engineers and pensioners.

In what concerns the education level, one detects very different situations depending on the natural area analyzed. In the total 61, 4% of the inquired customers have a graduate level, 27,7% high school level and only 10, 8% have elementary education (mainly at SENR and SMMNP). Then the natural parks clients' majority has a university degree. About the question on what the reasons to choose Alentejo as tourist destination, the answers are most diverse: landscape, work, people, and peaceful environment. Individual events are also a factor to come to Alentejo: a cheese fair in GVNP or a jazz festival in Portalegre (SMMNP) can act as powerful attraction elements in the regional context. Historical and architectural sites also play an important role, namely in SMMNP (where 3 important castles are located).

As we can see, leisure is the main reason to visit these areas. This is true to all the natural areas under consideration, with the exception of Santo André and Sancha Lagoon Natural Reserve where business was pointed as the main reason. Consequently, it is in this Reserve that the average stay is higher (6 nights).

The Southwest Alentejo and Vicentin Coast Natural Park also presents a longer average stay, as during the summer holidays many people enjoy its location near the beaches. The remaining natural areas have an average stay of just two days. Thus, in the total, the average is 3.6 nights. On the information source, the answers pointed to Internet, friends and family. There are also some references to the workplace or colleagues. On the question of activities, they are diverse. But in total, the most popular category is "other activities": rest, walk, cuisine. Sports also attract many people specially those who focused on aquatic activities such as surfing, windsurfing or swimming as well as hiking and interpretative pathways. Culture presents some relevance, particularly concerts, castles and local museums. Business tourists' state that they use their free time to explore the location, taste the cuisine and will likely return again in leisure. Only two people said that the health facilities were bad or absent. Catering is generally classified as "good", despite the fact that a majority of people complained about the lack of restaurants, cafes and hotels for the middle / high class. The few existing are classified as "good". Restaurants were worthy of the highest praise, many often stating that this was the main reason to come to Alentejo. A majority of answers show that these are people who are used to this type of tourism. Those who don't have this habit say they are considering doing it in the coming years, taking into account the beauty of the landscape and the sports. To the question whether they intend to return, only two people answered negatively in the Guadiana Valley Natural Park. Many say they only intend to return under the condition that Alentejo does not change in the coming years.

Thus, one can conclude that the actual tourists are potential future customers, as they declare to be satisfied.

#### 4.4. Related and Supporting Industries

Around 85% of the inquired units believe to depend on related and supporting industries in order to be successful in their business. The most commonly identified factors are natural patrimony (sightseeing and cultural tourism) and, more specifically, the existence of beaches (especially during the summer season). That's particularly the case of the Southwest Alentejo and Vicentin Coast Natural Park (SAVCNP). The inquiries conducted

via-telephone allowed to note down some qualitative aspects that should be pointed out. Activities such as animal's watching are specially requested by families with small children, or by couples with some knowledge on the matter (e.g. bird watching). Trekking activities are also very popular among the couples as an alternative to the traditional sun and sea.

Among the factors mentioned by the enterprises, relevance to the Meetings & Incentives (normally pointed out by the lodgements near to the SMMNP, Sports and cultural events in the various municipalities are also commonly mentioned. In bigger lodgements, the use of regional public/private services (such as local transports like taxis or cleaning services) presents a greater regularity. Food and beverages are supplied in 82% of the inquired firms from regional and local sources (the reminiscent 18% prefer national suppliers), a value which points to a very satisfactory cluster cohesion. Law and financial services are mostly guaranteed by regional suppliers. Tourism animation is the sector where clearly lies the highest propensity to partnerships establishment. At least 91% of the inquired firms make regular associations with other local/regional agents in order to offer a wider and more articulate list of leisure activities to their clients.

#### 4.5. Firm Strategy, Structure and Rivalry

The vast majority of the inquired firms have not established any kind of partnership (60%), despite the fact that they recognize it as a most important factor. The remaining 40% established cooperation agreements, especially in the tourism animation area (and, more informally, with restaurants), namely with local/regional enterprises. In some cases it was possible to identify the partner: it's the case of the so-called "Salt Way" (Alcácer do Sal) or the "Badoka Safari Park" (Vila Nova de Santo André and Santiago do Cacém). The majority of the units (31 among the inquired 59) do not take part in any local, regional or national sector association. Among the 33% that answered affirmatively to this question, the biggest share recognized great benefits in this fact, mostly in terms of access to information. Designations such as "Alentejo Heritage" "Portugal Hotels Association" or "AETAL – Tourism of Alentejo" can be placed among the most named regional/local sectorial associations.

More than 1/3 of the lodgments admitted to cooperate with national travel agencies. Approximately 22% do not cooperate in any kind of distribution and placement channel. A similar situation can be verified in the partnerships with Tour Operators: more than 1/3 of the units cooperate with com National Operators.

#### 4.6. Public Policies

All the inquired entrepreneurs assumed to be currently facing difficult times. Nevertheless, there is a wide range of variation in the nature of these problems.

In what concerns the existence of local and regional problems, the most cited were the lack of building maintenance and the low quality of public services. Even so, the most identified problems (36%) concern to the tourism sector itself. Seasonality and the weakness (or even inexistence) of public municipal policies (e.g. in the promotion of the municipality as a tourist destination) are among the main problems. The difficulty to find specialized

workforce (Food and Beverages), bureaucracy, lagging period to obtain licensing papers and the lack of intra-firms cooperation are some of the identified problems. The problems posed by the current World economic crisis concentrated 31% of the answers. National Parks management problems are also mentioned repeatedly. Entrepreneurs view the Parks' organizational structure in a general negative perspective, in particularly what concerns the inexistence of cooperation strategies between Parks and firms. The existence of parks promotional material in the lodgment reception areas is the only connective element between the two entities (parks and firms). As far as we could understand, there are no specific relationship channels between the parks and the lodgment agents - quite dependent of ICNB. On their part, protected areas managers assume to make some kind of cooperation with local authorities and with Tourism officials. Parks directors believe that it is not their role to promote common strategies with other parks.

In conclusion, despite the individualism of entrepreneurs and certain mistrust on the part of hotels and protected areas managers, one can identify a trend towards increased cooperation intra and inter-firm business.

When ask to make a prediction, entrepreneurs presented a wide variety of perspectives. Except for one or two rural tourism facilities (e.g. "Monte das Faias" in Grândola), all the answers pointed to increasing difficulties in the near future. Entrepreneurs adopt one of the following three distinct behaviors: (i) The ones that will try to redefine their position in the market by reating more services (aim to attract more tourists and per capita spending) like spas, restaurants or unit capacity increase or creating cooperation protocols, in order to offer more (and thematically wider) leisure opportunities; (ii) Those who redefine their position in some markets, namely the Nordic, through agreements with foreign Tour Operators. (iii) Those who "will wait and see" to what the future might bring, maintaining (for now) their business and commercial strategies; (iv) The ones that assume to have given up all hope in their businesses and are even thinking of closing, claiming that the demand is going to decrease, affecting the sustainability of their core business. When questioned about the Strategic Plan for Tourism the Nature Parks managers were unanimous, agreeing that the Alentejo should be an investment priority

The SWOT Matrix clearly shows the Alentejo's high potential to develop a tourism strategy based on its endogenous natural resources, such as architectural values, parks and reserves. Nevertheless, it will be absolutely vital to define a set of goals that will allow Alentejo to surpass the major threats and to reduce/eliminate the main weaknesses, such as the lack of cooperation between tourism economic agents. This is an important challenge for Alentejo's near future.

## FINAL CONCLUSIONS

After a brief observation of the collected data and assuming the theoretical approach explained on the first part of this work we can assume the tourism can be considered a basic strategic axis to the Portuguese sustainable development. Over the last few years there has been a strong increase in the number of investments in sectors not related with "Sun-Beach" main core. These investments are mainly located in the inner parts of the country with low population density, which is the general case of the Alentejo region.



<p><b>Strengths</b></p> <ul style="list-style-type: none"> <li>• Suppliers are in most cases regional;</li> <li>• The proportion of registered foreign guests come to be higher than recorded throughout Nut II;</li> <li>• Alentejo shows a certain attraction on the tourist market of high consumption of nature;</li> <li>• Existence of large number of units of tourism in rural areas;</li> <li>• Existence of five natural areas with great potential;</li> <li>• Wealthy cuisine, landscape, cultural and natural environment;</li> <li>• Attractive beach and coastal areas;</li> <li>• Fauna, flora and attractive habits;</li> <li>• Ability to adventure sports.</li> </ul>	<p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>▪ Lack of cooperation between tour operators;</li> <li>▪ Existence of a low supply on nature oriented activities;</li> <li>▪ Greater dependence on the national market (without much of a motivation for travel);</li> <li>▪ Large seasonality (not always the height of summer is the richest and most suitable for visiting the parks / nature reserves);</li> <li>▪ Much of the staff employed in the units does not have any specialized training;</li> <li>▪ Accessibility reduced;</li> <li>▪ Reduced number of beds;</li> <li>▪ Environmental sensitivity;</li> <li>▪ Low qualifications;</li> <li>▪ Little awareness of the existence of natural areas;</li> <li>▪ Low environmental awareness;</li> <li>▪ Low entrepreneurship and disclosure of protected areas;</li> <li>▪ Low use of local potential.</li> </ul>
<p><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>• Increased national awareness about the importance of preserving the environment, thus inducing a market segmentation on nature touring and cultural landscape;</li> <li>• Awareness of the lack of promotion by units of housing;</li> <li>• Dynamics tourism in nature;</li> <li>• Increasing activities related to sports to nature;</li> <li>• Creation of a cluster of tourism of nature;</li> <li>• Increased cooperation and competition between different companies.</li> </ul>	<p><b>Threats</b></p> <ul style="list-style-type: none"> <li>▪ Destinations competing national and Extremadura (in Spain) with better means of distribution and marketing;</li> <li>▪ International economy which retracts the potential for travel to the markets of fitness "nature";</li> <li>▪ Destinations similar in Portugal and abroad better known and used from the tour;</li> <li>▪ Lower business cooperation;</li> <li>▪ Low accessibility compared to other tourist destinations;</li> <li>▪ The over-marketing can generate a mass tourism;</li> <li>▪ Risk of environmental degradation.</li> </ul>

We consider Parks and Reserves to be a value-added resource that deserves to be included in the “National Tourist Supply”. These areas represent spaces where is possible to experiment a peaceful environment and a general feeling of decompression, which is no longer possible in Algarve or some parts of the western coast line. The choice of Alentejo as our case study took into consideration elements such as geographical dimension, patrimony and the existence of an important network of parks and natural reserves. We argue that Alentejo offers a unique potentiality to the development of the so-called “nature tourism”. This type of tourist supply is considered to have a strong growth

potential mainly due to the European market behaviour (Tourism National Strategic Plan - PENT, 2007).

Can we conclude that Alentejo is considered one of the main elements in this new national strategy? On one hand, the PENT assumes that the promotion of nature tourism is a strategic challenge, at national level; on the other hand, when it comes to define the regions with greater potential, Alentejo is strangely missing. The authors see Alentejo as a region with a high investment potential, both for public as for private and nature is clearly an appropriate option for this region..

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