

Supply-side Perspectives on Outdoor Tourism in the North of Portugal

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Abstract: Nowadays, the tourism sector presents many opportunities and challenges. Outdoor Tourism (OT), due to the unusual situation experienced by the pandemic caused by COVID-19, maybe one of the main opportunities to promote the local development of tourist destinations. Most of the literature developed in this context has focused the demand side. Therefore, the investigation intended to fill this gap, considering the perspective of the supply side, taking into account a vision of sustainable development. To meet this gap, the main objective is to contribute to the characterization of Outdoor Tourism (OT) in the North of Portugal, and understand the potential of OT in the perspective of supply. Thirty-eight tourist entertainment companies (TEC) were interviewed to assess supply and perceived customers' motivations. Of the seven Nomenclature of Territorial Units for Statistical Purposes (NUTS), the Northern region was considered to be an area with enormous potential for Nature-related tourist. For the supply side, seasonality and climate were identified as important factors supporting environment preservation. Radical experiences, adventure and getting out of the routine were identified as motivating demand factors, as well as the contact with Nature and the landscape. We have also observed that if we consider the stimulation of the local economy by OT, there is still a lot to do. The evidence pointed to some social imbalance, namely related to employability. Employees were hired according to the evolution of demand, which favours unemployment and social instability. Also, the tourists/customers are the main channels of communication of the activities; the word-of-mouth (WOM) of costumers' experiences, personally or through online social media, takes on a prominent role. In this sense, tourists' online reviews, testimonies and word-of-mouth can be optimized through social networks and digital marketing. Finally, to evaluate the region's potential for the OT, the interviewees suggested integrating the players involved with the OT into a single network, supporting the activities and promoting the region.

Keywords: Outdoor Tourism, Word-of-mouth, Tourist Entertainment Companies, North of Portugal, Sustainable Development

1. Introduction

Conceptually, Outdoor Tourism (OT) includes the search for outdoor recreational experiences. Considered a special destination product, combining tourism with natural, cultural and human resources (Hao et al., 2016), it brings together researchers from different disciplines, interested in outdoor and adventure activities (Sand and Gross, 2019).

OT is, sometimes, linked with adventure tourism (AT), which involves interaction with the natural environment associated with some risk, real or perceived (Chen, Mak and Kankhuni, 2020), the participant's expectation and perception, as well as the characteristics of the place where the activity takes place (period, the geography of the territory and climate), and also the correlation between previous experiences and perceptions of risk on the part of the participant (Pomfret, 2006). These activities were identified as relevant because they produced physical and psychological effects considered beneficial for the health and well-being (Reid and Kampman, 2020) of individuals and, consequently, of social groups.

Outdoor activities also have some peculiarities. For example, the geographical dispersion and the lack of integration of different interests and stakeholders (Musavengane, Siakwah and Leonard, 2020), who do not always share common objectives and which make it difficult to manage the outdoor tourist product. On the

other hand, the collaborative management of natural resources, with divergent objectives, complex decision-making processes and the cost-benefit ratio for the different parties involved in the collaboration, are constraints associated with OT (Musavengane, 2019). For better collaborative management of natural resources, the author suggested that community-based projects should be inclusive and participatory, centred on the vital elements of social capital. According to Dube and Nhamo (2020), climatic factors also interfere, such as excessive sun or rain, wind, heat or cold, associated with the activity and with the potential to influence supply.

Considering these aspects, the following research question was raised: is it possible to contribute to implementing measures that ensure the development of OT in a sustainable way? To find an answer to this question, regions of the Portuguese territory were considered, according to the Nomenclature of Territorial Units for Statistical Purposes (NUTS) and, among these seven regions of NUTS II, the North region was identified for several reasons, mainly for having obtained significant results in terms of attraction, but at the same time, having desertified rural areas and worse results when compared to the more traditional tourist regions (Fernandes et al., 2020; Silva et al., 2020). According to the authors, this region has enormous potential for tourism oriented to Nature. Thus, the main objective is to contribute to the characterization of Outdoor Tourism (OT) in the North of Portugal and understand the potential of OT in the perspective of supply.

In this regards, a qualitative research was carried out, through interviews with thirty-eight TEC managers inserted in NUTS II North of Portugal, with the objectives of contributing to the characterization of OT, and to understand the potential of OT from the perspective of supply, where supply and the perception of motivations for demand were explored.

2. Theoretical background

Visitors of territory and practitioners of the most diverse outdoor activities have different skills, emotions, expectations, experiences and sociodemographic profiles (Buckley, 2007). Some people seek OT to get out of the routine (Šimková and Holzner, 2014), relax or feel integrated with Nature (Sand and Gross, 2019), while for others the most important is physical activity (Niezgoda and Nowacki, 2020), motivations that converge to activities related to Nature Tourism (NT). However, there are individuals who seek activities with a greater degree of challenge (Tsaour, Lin and Liu, 2013), in physical and/or emotional terms, as is the case of activities related to Adventure and Animation Tourism (AAT) (Chen et al., 2020).

This diversity makes it crucial to understand the motivations and expectations (Du, Buckley and Tang, 2016) of demand, in order to assist supply in the development and structuring of outdoor activities, also considering the risk involved (Ayen, 2012), effort, heterogeneity (Rantala et al., 2018) and the participants' skills. The demand for OT is also conditioned by some cognitive aspects such as personality, attitudes, values, lifestyle (Šimková and Holzner, 2014) or by contrasting emotions, such as fear and joy, which can be replicated to several OT activities (Faullant, Matzler and Mooradian, 2011). Pomfret and Bramwell (2016) indicate that intrinsic and extrinsic motivations, such as socialization, the challenge, contact with Nature or reaching the goal, result in different levels of stimulus.

Another important factor is seasonality as it influences both demand and supply. It is difficult to measure seasonality (Koenig-Lewis and Bischoff, 2005) which can either be a barrier to OT or favour the recovery of natural resources (Koenig-Lewis and Bischoff, 2005).

This situation highlights the importance of sustainability in tourism development, which contributes to improving the quality of life and assumes itself as an effective predictor of community involvement (Woo, Kim and Uysal, 2015). For Doran, Schofield and Low (2020) the tourism industry should offer mechanisms to overcome possible barriers, being essential the involvement of local communities to enhance the benefits associated with OT (Jirásek and Hanuš, 2020) and the valorization of the region (Booth, 2018). The promotion of activities is crucial, and it can be done by the customers through positive evaluations and word of mouth (WOM) (Rahimzhan, Ozturen and Ilkan, 2020).

3. Methodology and Methods

The option to develop qualitative research (Lamb, Gallagher and Knox, 2019) is justified by the i) difficulty in standardizing the activities developed in TEC, which depend on independent external factors, such as the territory geography and the climate, ii) importance of knowing the specific factors of the Northern region of

Portugal, iii) market dynamics, which results from specific factors, such as seasonality and (iv) diversity of the organizations involved, which mainly covers micro and small companies.

Considering that the TEC are distinct and function independently, to know the characterization of the region and evaluate the potential of OT, the data collection instrument, identified as the most appropriate, was the individual exploratory and in-depth interview (Batista, Matos and Nascimento, 2017).

For the sample selection, several sources of information were used, such as the National Register of Tourist Entertainment Agents, the Portuguese Association of Companies of Congresses, Tourist Entertainment and Events or the websites of the eighty-six existing city councils in the North of Portugal.

Regarding the analysis, in order to ensure the anonymity of the interviewees, companies were coded sequentially and according to the region. This codification used the initial letters of the region’s nomenclature, according to the corresponding NUTS III, and a sequential number starting in 01 and ending in 38. Table 1 shows the distribution of activities developed by these companies in each NUTS III.

Table 1: Activities developed by the interviewed companies, distributed by the NUTS III of North of Portugal

OT modalities/activities	North of Portugal NUTS III regions							
	AM	AT	TS	AMP	AVE	CAV	DOURO	TTM
Hiking (trails and ecovias)	X	X	X	X		X	X	X
Mountain Biking	X		X			X	X	X
Stand Up Paddle (river)	X		X	X		X	X	X
Canoeing	X	X		X	X	X	X	X
Canyoning	X		X	X	X	X		
Rafting	X		X	X	X			
Surf/ Kitesurf/ Windsurf/Bodyboard	X							
Climbing	X				X	X		X
Fishing								
Wildlife Viewing								X

Note: Alto-Minho [AM]; Alto Tâmega [AT]; Tâmega e Sousa [TS]; Área Metropolitana do Porto [AMP]; Cávado [CAV]; Terras de Trás-os-Montes [TTM].

Source: Own elaboration

The sample allocated interviewees in proportion to the number of TEC existing in each of the eight NUTS III (Etikan and Bala, 2017), totaling 370 companies (176 in AMP, 52 in AM, 46 in CAV, 31 in DOURO, 20 in AVE, 19 in the TS, 18 in the TOM and 8 in the AT). However, it was not possible to reflect this distribution in the interviews carried out, due to the availability of the TEC (in the case of AMP, the number of interviews fell short of what was planned and in AM, about twice as many were carried out).

To be representative, Deterding and Waters (2018) suggested a minimum of thirty interviews. Information saturation was reached after the thirty-eighth interview, when the responses among the interviewees began to be similar, without adding new information (Neuman, 2014).

The interviews, carried out between February and April 2020 (duration between 60 and 90 minutes), were operated in three modalities, depending on the availability of the interviewees and the global pandemic scenario (COVID-19): i) face-to-face interviews, which occurred at company headquarters; ii) telephone interviews; iii) interviews using online chat software, such as Skype or Zoom.

The main objects of study were the activity developed, the supply and the perception that companies have in relation to demand. With these dimensions in mind, a script was structured (Kallio et al., 2016), mostly formed by open questions, divided into three groups: (GI) issues related to the activities of companies/regions; (GII) issues related to the main aspects of demand perception; (GIII) issues related to the main aspects of the offer.

The qualitative analysis of the results was based on textual (Kuckartz, 2014) and systemic analysis of the interviews content (Lombard, Snyder-Duch and Bracken, 2002; Mayring, 2004; Milena, Dainora and Alin, 2008), having been also used quantitative techniques of descriptive statistics (Xiao and Smith, 2006) to identify patterns.

The analysis of the content started with the identification and quantification of keywords and/or their meaning in terms of context, in which codes were created to reflect the key concept, deriving categories and respective relationships, in terms of theoretical dimensions (Hsieh and Shannon, 2005) involving Nature, experience, aspects related to culture and socialization for the perception of motivation. In the scope of improvements three dimensions were identified: i) structural and support aspects for the use of resources, ii) organization and processes, and iii) network. The coding was used mainly to analyze the aspects related to the perception of the demand motivation and improvements to be implemented. The textual analysis was structured according to the offer (activity, environment and risk involved) and demand (notoriety and image of the territory, motivation, perception of risk and acquired experience), the background for the continuation of long-term activities, divided the environment (territory, climate and seasonality) and offer (activities and employees involved) and, finally, the consequences of OT activities which were grouped according to the economic (price and variety of offer), social (employability and local community) and environmental (resource conservation) dimensions.

4. Presentation and results analysis

Regarding the offer, among the 11 outdoor tourism modalities presented in this study, it was found that most regions offered activities related to hiking (hiking trails and ecovia), mountain biking, canoeing, canyoning, Stand Up Paddle (SUP) on the river, rafting and climbing. In turn, the observation of wildlife, Surf and Kitesurf/Windsurf were modalities found in only one of the NUTS III. The geographical location in regions with better territory and climate conditions or, possibly, in regions more recognized by the market, and the networks in which these companies are inserted, were highlighted as some of the aspects that influence the offer. As for fishing, paragliding and hang gliding, these activities were not considered because they were not developed by the interviewed TEC.

Without disregarding the importance of culture and socialization (referenced by 5 and 4 TEC, respectively), aspects related to Nature and Experience were the most reported (referenced by 23 and 14 TEC, respectively), a fact consistent with the activities within the OT framework. However, the perception of risk related to the likelihood of falls and accidents was reported differently by the TEC; in the interviewees' perception, the risk was considered low (1.03), since the majority (65.79%) considered there was no risk or a controlled risk, while 26.32% considered there was a moderate risk (four companies were not considered in this analysis due to the lack of an adequate response).

Another significant variable for demand was the region's notoriety and image. The result obtained, of sixteen values, allowed us to consider that, in the perception of the interviewees, the region had very positive notoriety and image, despite the several improvements to be implemented that are categorized in table 3. This transcript demonstrates the perception of notoriety: "In general, it is a "rough diamond". Foreigners appreciate Rio Paiva immensely, but there is still much to explore. Whoever comes to the North thinks it is an authentic region" [ATS02].

Table 3: Categorization of improvements to be implemented

Construct dimension	Indicators and respective concept of improvements to be implemented	Keywords (negatively associated)	Referencing (quantity)	
Structural and support aspects for the use of resources	Available structure to support the use of resources	Structure; exclusive spaces	13	25
	Preservation of natural resources and spaces	Maintenance; Cleaning; Preservation;	6	
	Support for the development of activities	Activity support; Signage	5	
	Public transportation	Public transportation	1	
Organization and processes	Bureaucracy	Elimination of barriers	2	21
	Practical training	Professional qualification	3	
	More Offers	Create different activities	1	
	Greater promotion	Greater promotion	6	
	Integration of companies and other stakeholders	Integration; Coordination; Awareness	9	
Network (Community)	Community support	Abandonment of the population	1	2
	Environmental education	Environmental education	1	

Source: Own elaboration

In the perception of most interviewees, structures (especially the use and maintenance of resources) and processes (mainly promotion and integration in networks) are key points to improve. For 84.21% there is a need for improvement on the part of public management, considered non-existent or disjointed, especially in terms of regulation, support and inspection. However, in terms of regional management, this perception is reversed with 86.84% of the interviewees considering there is participation in management.

4.1 Aspects related to the North Region characterization and the offer of Outdoor Tourism

In general, TEC offered a wide range of activities, on average four per company, mainly in the Douro region, Douro International Natural Park and Peneda-Gerês National Park [PNPG] to practice different outdoor modalities. The Douro, Minho and Paiva rivers offer excellent conditions for the practice of different aquatic modalities (ex: rafting, canoeing and canyoning) whereas, at the coastal level, Viana do Castelo is dedicated to the practice of modalities such as surfing, kiteboarding and windsurfing.

At the top of the activities developed by TEC (table 4), trails appear as the main one (63.2%), followed by canoeing (39.5%), BBT/Downhill and Rafting/Canyoning (26.3%).

Table 4: Activities developed by TEC

Activity	Number of companies interviewed to develop the activity (n)	Percentage of interviewed companies that had the activity (%)
Trails	24	63.2%
Canoeing	15	39.5 %
Mountain Biking/Downhill	10	26.3%
Rafting/Canyoning	10	26.3%
Surf/Bodyboard/SUP/Wind/Kitesurf	9	23.7%
Climbing	4	10.5%
Ecovia	2	5.3%
Wildlife Viewing	1	2.6 %

Source: Own elaboration

Despite the fact that most TEC offers this set of activities, the vast majority stated that they have a 'core product', determined by the annual demand or strategic location in relation to the available natural resources (table 5).

Table 5: Main activities/modalities in the TEC portfolio

TEC/activities/NUTS III	Reason why it is considered the 'star' activity(ies)
Hiking Trails (AT06, TTM08, TTM11, DOUR13, DOUR15, AM22, AM23, AM27, AMP31, CAV34, CAV35, CAV37)	"They are the focus of the company". "Part of the company and of what we want to sell/bet on. Hikes are a sustainable offer with less environmental impact. We made a match between demand and supply". "Sales volume... the company's genesis".
Rafting (AM24, AM25, AMP31, AMP33, AMP32)	"It is the genesis of the company. The company started with rafting". "Due to local conditions. The Minho River, which in the summer season is the only one where rafting can be practised. It is our star activity". "They are the most important activities regarding the owners' training (ex-military, sports, mountaineering). Rafting is the most profitable activity".
Canoeing/Kayaking (AM20, AM26, AMP31, AVE38, CAV34, DOUR17, TTM10, TTM11)	"There is more demand and customers like the places where they practice (Douro)". "Due to the volume of participants".

Source: Own elaboration

There are modalities, such as climbing, that are hardly in demand as a unique experience, and can be offered in association with other activity(ies) (pack experience), matching the dynamics of an "adventure park".

Although many sports can be practised throughout the year (ex: hiking trails), the period of least demand is between November and March (part of autumn and all winter).

4.2 Aspects related to the perception of the demand and potential of OT, from the perspective of TEC

The perception of demand was consistent with the assumption that the offer must be in line with the client's needs, desires and expectations, as shown in some parts of the interview (ex: "...because it is the most wanted for our target market" [AM20], "The demand for these activities is greater" [AM21], "They are the most sought-after activities" [AM29], "...because they are more in demand and are simpler to organize" [TOM08]). Only 18,42% of the companies described aspects related to supply and 5,26% related aspects of the two dimensions, supply and demand (figure 1).

Although all respondents answered the question about what would be the most important activity(ies), 26.32% did not explain why a particular activity was the most relevant.

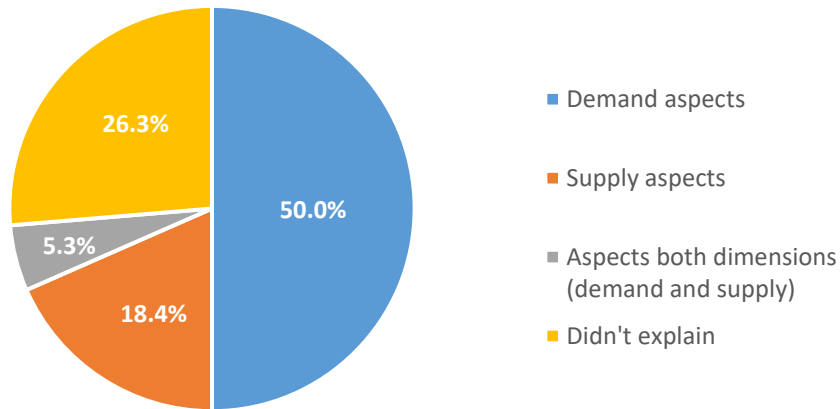


Figure 1: Factors that justify the most relevant activities for the company

Source: Own elaboration

Concerning the number of outdoor practitioners, those linked to the aquatic environment (river and sea totalling 31.130 activities) were considerably higher than those ones who were practising on land activities (hiking trails, ecovias, climbing, mountain biking/downhill totalling 13.593 activities), which reflects the relevance of these activities to TEC (figure 2).

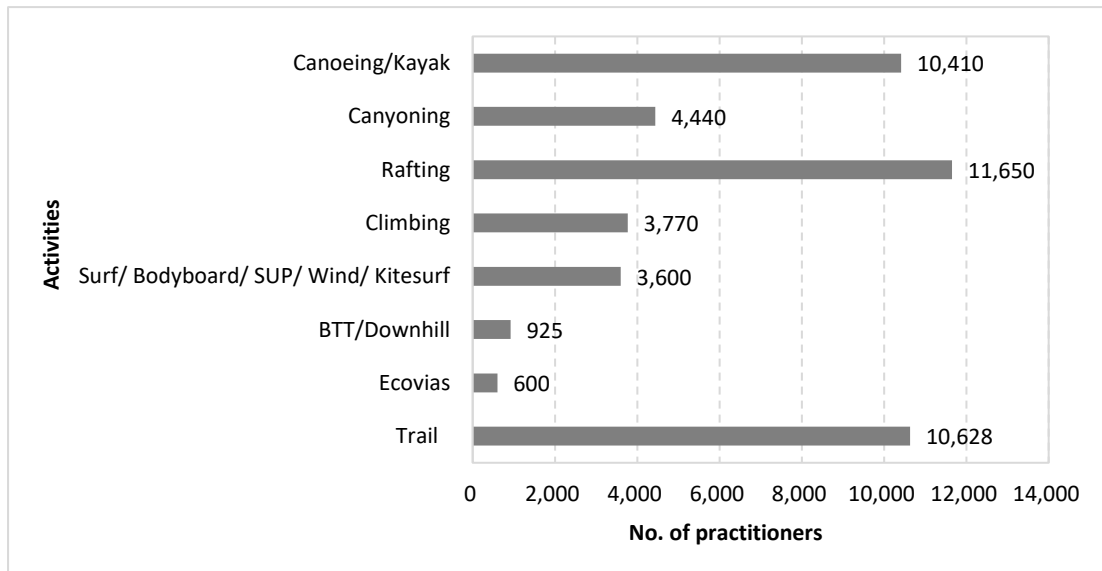


Figure 2: Number of annual clients/practitioners by types of outdoor activities (2019)

Source: Own elaboration

The period of greatest demand in the hiker modality (namely on the trails) was distributed mainly March and October, which reflects the importance of the climate in spring and summer (figure 3).

This seasonality is reflected in the organization and characterization of the companies, mainly micro-companies with 1 to 3 employees (68.42% of the companies interviewed), who hire professionals temporarily during periods of greater tourist demand, particularly in July to August.

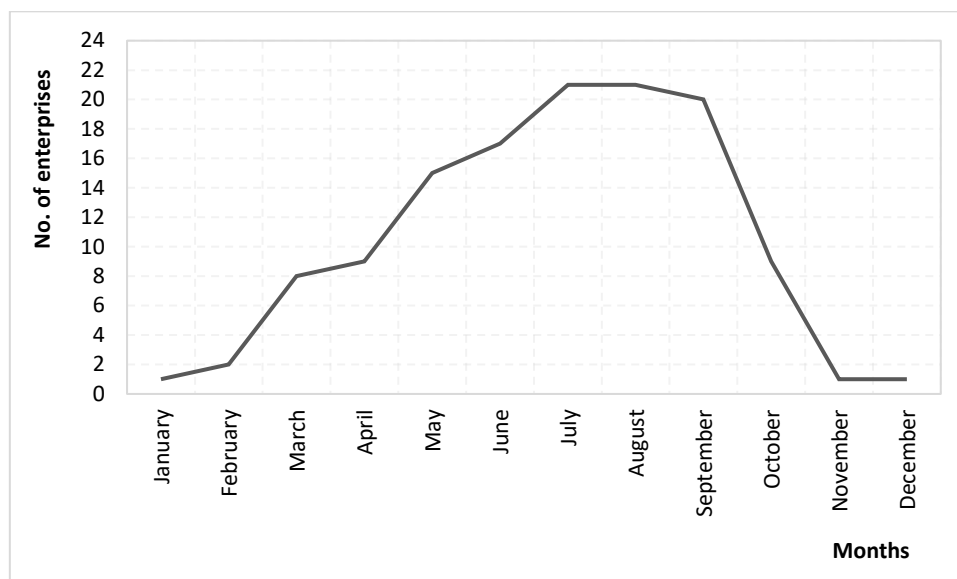


Figure 3: Distribution of demand for trail activities (2019)

Source: Own elaboration

Concerning the nationality of demand, 73.7% of companies stressed the importance of national tourist demand. As for international tourist demand, around 39.5% of companies highlighted French and Dutch, 34.2% German and Belgian, and 31.6% Spanish nationalities.

Among the motivating factors for OT, companies highlighted the contact with Nature (44.7% of companies), landscape (15.8%), radical experience, adventure and motivation to do a different activity (13.2%), and other socio-cultural aspects (23.7%); only one company identified authenticity or rest as motivating factors for demand.

According to the interviewees' perception of the demand profile, 65.79% of the companies highlighted the importance of families composed of couples with children, followed by the segment of groups of friends or colleagues (35.79%), of couples without children (21.05%), business groups with the objective of integration (21.05%), solo individuals (15.79%) and groups of young people from schools (7.89%).

Regarding the form of purchase, all TEC reported a direct demand. Some companies explained the importance of channels such as websites or telephone contact, in addition to searching on the spot. Around 47.74% of the companies also mentioned partnerships with travel agencies and tour operators or specific platforms related to the tourism sector.

According to 52.63% of the interviewed companies, the majority of practitioners perform a single activity despite existing demand for two or three activities, a fact highlighted by 36.84%.

Regarding customer loyalty, all companies reported having customers coming back. Except for a single company, all the others mentioned the importance of the recommendation through social networks, evaluations, comments and word of mouth as good practices, having been stated that "our customers are our greatest promoters" [AMP30].

It was not possible to identify a gender, qualification or age range profile within demand, standing out many differences and few similarities that point to a diversity of segments in relation to these factors.

However, the vast majority stressed that individuals are well informed, with some knowledge and financial capacity, assuming that lifestyle associated with motivations is a crucial aspect for segmentation. Additionally, it was noted that adventure parks, which commercial dynamics are distinct from a TEC, due to their functional characteristics, can work in other periods, but the main market remains the internal market, with a youth/student profile.

5. Discussion

Nature promotes a physical experience, but also explores the social and cultural aspects of the experience (Sand and Gross, 2019). In this study, the contact with Nature was highlighted by the interviewees, being considered one of the main motivations for demand. Also, other results of this study are in line with previous research that put forward other motivations, as an intrapersonal challenge, in particular, for novice adventure tourists (Tsaur, Lin and Liu, 2013), and strengthening personal self-esteem.

The results of the exploratory research also provided evidence of adventure (Chen et al., 2020) and getting out of the routine (Šimková and Holzner, 2014; Niezgodna and Nowacki, 2020) as reasons for motivating demand. According to Doran *et al.* (2020), social networks and distribution channels enhance competitiveness.

Seasonality caused by the seasons, for example, can influence demand (Koenig-Lewis and Bischoff, 2005). However, this effect may be in the opposite direction. For some individuals, the heat in summer can be perceived as an unpleasant sensation, potentiating a new demand for autumn or even winter tourism season. Therefore, the interviewees highlighted seasonality as a concern, but also as an opportunity to be exploited. Barriers like natural 'climate-dependent' attractions also should be overcome for the valorization of the region (Booth, 2018), as well as achieving sustainability to guarantee the continuity of OT activities.

Finally, the interviewees suggested that the client can promote the activities, through the word-of-mouth, sharing recommendation through positive evaluations, which are in accordance with other studies in the literature (Rahimzhan, Ozturen and Ilkan, 2020).

6. Conclusion

In order to contribute to the characterization of OT in the North of Portugal, and to understand its potential from the offer perspective, a qualitative investigation was developed through in-depth individual interviews with TEC distributed by different NUTS III of North of Portugal.

Among the most significant assumptions for the characterization of Outdoor Tourism in the north region, this investigation highlighted the importance of the geography of the territory where OT activities and experiences are inserted, involving location and climate, and argued about the importance of perceiving demand to exploit supply.

Considering that i) the majority of the demand is of Portuguese nationality, ii) the greatest demand is in the period between May and September (demand from domestic tourism, specially associated with school holidays) and iii) although the international market is significant, couples with children have highlighted segments, followed by groups of friends or colleagues, it is essential to develop an adequate supply for the domestic market. Innovation in terms of marketing can increase demand in low seasons, for example, through the integration of the product concept and price policy.

According to the interviewees' perception of demand, there is still much to be done. According to the interviewees, the region has potential that is not being explored. It is necessary to support TEC and promote the region internationally.

In terms of motivation if, on the one hand, contact with Nature and the landscape reinforces the role of the territory in the perception of demand and, consequently, in the offer of OT, on the other hand, the radical experience, the adventure and getting out of the routine were highlighted aspects, related to the motivation of demand.

Respondents defended the region's untapped potential. In addition, the risk was considered low and mainly associated with activities and the environment. According to the interviewees, there are safety rules to guard

against the risk and there is insurance for what cannot be taken care of. From the perspective of TECs, the image was considered positive.

In addition to the demand on the spot, the use of partnerships, social networks or other distribution channels, such as websites or telephone, reinforced the offer's competitiveness. According to the interviewees, the customers themselves can carry out the promotion, which emphasizes the importance of evaluations, testimonies and word of mouth. The creation of a network was also suggested, for the integration of those involved and the preservation of resources.

As this is a qualitative investigation, the results allowed to know the perspective of TECs from the North Region, in relation to the experience of the previous year but did not allow to make inferences concerning other regions. In addition, the interviewees' view may differ from the perspective of other stakeholder groups, and the identified factors must be validated. In this sense, it is suggested to carry out a quantitative investigation to confirm the significance of each of these factors, especially the factors associated with the perception of demand.

Finally, the interdisciplinary approach must seek to overcome the seasonality barrier, and achieve sustainability in three dimensions: economic, social and environmental. Economic sustainability can be defined through the balance between supply and demand, and this balance can have an impact on social sustainability. However, it is necessary to pay attention to the preservation of the environment, since Nature is central to guarantee the continuity of OT activities.

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Mini Track Chairs



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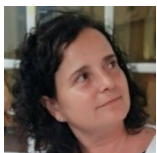
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