

Demand and Supply of Outdoor Tourism activities in Northern Portugal

- A survey based approach

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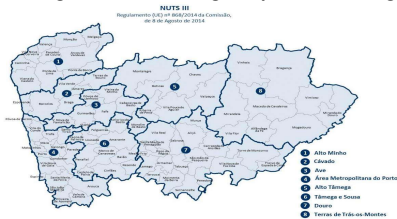
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INTRODUCTION

- Tourist activities are an essential driver of economic growth via tax revenues, infrastructure development and job creation (Cárdenas-García et al., 2013).
- Tourism is regarded as a priority domain within the scope of the research and innovation strategy for smart specialization (RIS3) in Portugal; and Outdoor Tourism is increasingly seen as a mechanism for maintaining biological diversity and natural and cultural heritage.

This paper focuses on the North of Portugal, as a diversified region with unique natural resources, to create information regarding both resources and equipment and business dynamics; the evolution of tourism supply and demand.

Figure 1- Northern Region by NUTS III sub-regions



OBJECTIVES

- Evaluate the supply and analyse and segment the demand related to Outdoor Tourism in the Northern region of Portugal;
 - Mapping the variables related to supply and demand that make it possible to measure and monitor Outdoor Tourism, in order to contribute to responsible and sustainable tourism development and for the future orientation of planning and spatial planning policies.
- The literature on the demand for outdoor tourism includes the works of Mehmetoglu (2007); Armario (2008); Luo & Deng (2008); Lee (2009); Bus (2009); Sæthórsdóttir (2010); Tangeland & Aas (2011); Kil et al. (2012) and Kastenholz et al. (2014). These authors study the tourism activities through questionnaires.
- The supply side of tourism activities has been studied via interviews to entrepreneurs by numerous authors, such as Lundberg & Fredman (2010); Rauken et al. (2010); Fredman et al. (2012); Kastenholz et al. (2012); Wang & Lyons (2012); Jones et al. (2013); Shan & Marn (2013), and McNicol & Rettie (2018).

DATA & METHODOLOGY

Qualitative & quantitative: interviews and questionnaires

Demand:

- Study population:** sample
- Sampling:** non-probabilistic
- Inclusion criteria:** practitioners of Outdoor tourism activities at selected events in the North region between May and July 2019
- Data Collection:** Anonymous voluntary. Questionnaire with 26 questions, collected directly from the sample
- Data Analysis:** descriptive analysis of outdoor tourism activities, sociodemographic, socioeconomic and professional variables

Supply:

- Study population:** Outdoor tourism companies (20)
- Sampling:** from a list from the National Tourism Register (RNAAT)
- Inclusion criteria:** active firms operating in Outdoor tourism activities in the Northern region of Portugal in 2019
- Data Collection:** semi-structured interviews with 11 questions, performed directly with entrepreneurs
- Data Analysis:** countenance analysis of organizational, sociodemographic and socioeconomic variables

RESULTS

Demand side: 40% of respondents are resident in the Northern region; while 60% are non-resident.

Table 1- Composition of Outdoor Activities covered by questionnaires

| Activities | # | % |
|-------------------------|----|-----|
| Walking | 42 | 28 |
| Trail running | 32 | 21 |
| Surf | 18 | 12 |
| Running | 17 | 11 |
| Stand up paddle | 11 | 7 |
| Boat tours | 8 | 5 |
| Wildlife observation | 7 | 5 |
| Athletics | 6 | 4 |
| Circuits/tourist routes | 5 | 3 |
| Bird watching | 4 | 3 |
| BTT | 1 | 1 |
| Cycling | 1 | 1 |
| Total | 32 | 100 |

-Nearly 50% of outdoor activities covered by the questionnaires refer to walking and trail running. The activities of cycling and BTT represent each 1% of total activities surveyed in the Northern region of Portugal.

Table 2- Characterization of Questionnaires respondents

| | Average |
|-------------------------------------|----------------------|
| Age | 40 (+/- 13.89) |
| Gender | Female |
| Marital status | Married |
| Nationality | Portuguese |
| Yield (month) | 2401-3000 (€) |
| # dependent children | 1 (+/- 0.94) |
| Profession | Self employed person |
| # times of practice of the activity | 1-2 times / week |

- The average questionnaire respondent is female, 40 years old, married, self-employed with a monthly income of 2401-3000 €.

Supply side: 20 firms operating in outdoor tourism activities

Table 3- Future locations of supply sites

| # | % | Future locations |
|---|----|--|
| 9 | 53 | Do not want to displace activities |
| 3 | 18 | Want to expand activities in the same municipality |
| 6 | 35 | Want to expand activities in other municipality |
| 2 | 12 | Want to expand activities to several other municipalities. |

- Interviews to entrepreneurs supplying outdoor tourism activities indicate that more than half entrepreneurs do not want to displace their activities sites and 18% wants to expand activities in the same municipality.

Table 4- Characterization of customers of Outdoor tourism firms

| | Average |
|---------------------------|----------------------|
| Age | 71 |
| Gender | 52% male/ 48% female |
| Education | College degree |
| Consumption Intensity | 1 (+/- 0.69) |
| Motive 1 | Contact with nature |
| Motive 2 | Landscape beauty |
| Motive 3 | Know the region |
| Seasonal hirings | 2 (+/- 2.49) |
| Image of the North region | It has potential |

- The average customer is 71 years old, with a college degree. There are no significant gender differences.
- The main motive for the practice of outdoor activities is contact with nature.
- Customers usually buy one outdoor activity and 2 more employees are hired in high season, on average.
- The Northern region is regarded as still unknown but with potential to grow in terms of outdoor tourism.

CONCLUSION

- On average, tourists visit the Northern region 5 times a year; with an average length of stay of 3 days and typically spend the night in rural tourism accommodations/cottages.
- Outdoor tourism demand in the Northern region is mainly composed by trained practitioners.
- These practitioners usually enroll in the activity in advance and buy it on their club/association.
- Over half of entrepreneurs are satisfied with their actual activities' sites.
- There are no significant gender differences between their clients.
- Most customers have at least a college degree, are composed of families that book the activity directly with the provider of outdoor tourism activities.
- Main motivations for outdoor tourism are contact with nature; the activity in itself and to enjoy the landscape.
- On average there are 2 seasonal employees.
- The Northern region is still unknown for many people, but it is regarded as a region with potential to grow.
- While outdoor tourism activities may be a crucial factor for competitive and sustainable destination development, they must be understood as a multifaceted whole, shared by tourists, service providers and the local community, and shaped by the destination-specific resources.
- The issue examined in this paper includes whether the actual supply of recreation opportunities meets the demand and how the demand and supply are likely to change in the future.
- From the policy-making perspective, an interesting question is what kind of action will be needed to achieve balance between both sides.

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