



## Who is consuming the countryside? An activity-based segmentation analysis of the domestic rural tourism market in Portugal



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### ABSTRACT

As a result of a well-debated set of transformations, rural areas are increasingly perceived as consumption rather than productive places, mainly associated to leisure and tourism. This paper aims to analyse the heterogeneity of domestic tourism consumption of rural areas. Based on a cluster analysis derived from a sample of the Portuguese population (N = 866) four clusters based on activities carried out in Portuguese rural areas were obtained – *The Active Visitors*, *The Passive Nature Observers*, *The Inactives* and *The Summer Family Vacationers*. These clusters of domestic market show diversity in the ways rural areas are perceived and consumed. They also differ regarding familiarity with rural areas, travel behaviour and sociodemographic profile. Results reveal the importance of offering different rural tourism products to these groups, thereby improving rural destination management and marketing.

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## 1. Introduction

Rural areas have, in many other parts of the western world, including in Portugal, progressively passed from places of production, in which agricultural activities once possessed a relevant socioeconomic role (Marsden, 1995; Oliveira Baptista, 2006) to places of consumption, in which leisure and tourism activities seem to play a paramount part (Bell, 2006; Halfacree, 2006; Perkins, 2006; Short, 2006), providing important contributions to these territories' economic development (Cawley & Gillmore, 2008; European Commission, 1999; Lane, 2009; OECD, 1994). As a result of a set of long-term transformations, rural areas in many European countries, including Portugal, are increasingly being perceived, mainly by urban dwellers, as places for tourism and leisure consumption-related activities (Bell, 2006; Cloke, 2006; Figueiredo & Raschi, 2012; Figueiredo, 2003; Halfacree, 2006; Jollivet, 1997; Murphy, 2014; OECD, 1994; Oliveira Baptista,

2006; Shucksmith, 2006; Woods, 2003). In Portugal, the urban consumption of the countryside is mainly oriented to remote or peripheral rural areas which are often represented as more authentic and able to preserve cultural traditions and environmental assets (Figueiredo, 2003, 2013).

In fact, many remote Portuguese rural areas are nowadays places in which almost every element of the remaining (sometimes untouched) rurality seems to be commodifiable and constitutes an amenity (Figueiredo, 2013). The progressive commodification of the Portuguese countryside is based on very positive and idyllic imaginaries of rurality (as in other parts of the world, as discussed by Argent, 2002; Figueiredo, 2013; Perkins, 2006; Short, 2006; Silva, 2014; Soares da Silva, Figueiredo, Eusébio, & Carneiro, 2016; Woods, 2007). Rural areas are frequently perceived as authentic and genuine, offering a vast set of opportunities for consumption, activities and rewarding experiences to urban visitors (Bell, 2006; Perkins, 2006; Silva, 2014).

As in other countries, a growing interest in the countryside, and, consequently, growing demand of its amenities, mostly by urban dwellers (e.g. Bel, Lacroix, Lyser, Rambonilaza, & Turpin, 2015; Devesa, Laguna, & Palacios, 2010; Frochet, 2005; Kastenholtz, 2002; Kline, Greenwood, Swanson, & Cárdenas,

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2014; Molera & Albaladejo, 2007; Murphy, 2014; Opperman, 1996; Perkins, MacKay, & Espiner, 2015; Park, Lee, & Yoon, 2014; Pesonen & Komppula, 2010; Pesonen, 2015; Ribeiro & Marques, 2002; Sidali & Schulz, 2010), can also be identified in Portugal. However, the socioeconomic contributions of rural tourism in Portugal are still limited. The occupancy rate, the Revenue per Available Room (RevPAR) and the length of stay at rural accommodations are very low (INE, 2016). Tourism in Portugal is still highly concentrated in coastal areas, strongly dependent on sun and beach tourism. Besides the great diversity of cultural and natural resources of Portuguese rural areas, the flow of visitors to these areas is reduced and mostly composed of domestic tourists (INE, 2016). However, even the closer and easier to reach domestic tourist market is apparently not sufficiently attracted to the countryside to contribute to a better performance of rural accommodation units.

Studies conducted in several countries and rural contexts demonstrate a diversity regarding the representations, consumptions of rural areas, as well as the profiles, behaviours, and motivations of visitors (e.g. Bel et al., 2015; Frochot, 2005; Park et al., 2014; Pesonen, 2012; Polo, Frías, Rodríguez, & Rey, 2016), a diversity which may also be identified in the Portuguese case (Kastenholz, 2002; Kastenholz, Davis, & Paul, 1999; Silva, 2014). This market heterogeneity needs to be better understood, not only in order to contribute to better manage and satisfy tourist demand, but also to contribute to a more sustainable development of rural communities in which tourism and leisure activities take place.

Particularly, segmentation analyses that contribute to product development - such as benefit-segmentation (Frochot, 2005; Kastenholz et al., 1999; Park et al., 2014), segmentation based on motives for choosing rural accommodation units (Polo et al., 2016) or a rural destination (Devesa et al., 2010) or activity-based segmentation (Carmichael & Smith, 2004; Pesonen, 2015) - are most useful for guiding destination management and marketing. They help design experience products and communication that would most likely attract and satisfy specific tourist groups and may thus be tailor-made to enhance the tourist's overall satisfaction with the destination. However, activity-based segmentation has rarely been applied to rural tourist markets. Most segmentation analyses study the effective tourist market present at a destination, considering both domestic and international tourists, while few consider specifically the domestic market (some exceptions are Bel et al., 2015; Carmichael & Smith, 2004; Devesa et al., 2010; Polo et al., 2016; Rogerson, 2015), although it might be the most easy to attract, satisfy and turn into loyal clients due to its geographical and cultural proximity (Kastenholz, 2004, 2010; Opperman, 1996) and thus eventually be considered the first target to go after. This paper aims to contribute to a better understanding of consumption practices of Portuguese visitors regarding their home country's rural areas, thereby providing relevant destination management information.

Previous studies published on domestic rural tourists were based on a) data collected from tourists encountered at a specific rural tourist destination at a particular time, frequently from convenience samples (e.g. Devesa et al., 2010; Rogerson, 2015), b) a general national 'tourism demand survey' (e.g. Bel et al., 2015; Carmichael & Smith, 2004) or c) on exploratory studies of potential rural tourists (e.g. on potential domestic farm tourists in Germany, Sidali & Schulz, 2010). The present study differs from the previous by surveying a representative sample of the country's population regarding representations and consumptions of the national rural areas, highlighting the activities sought as a relevant segmentation base of visitors of rural areas. Based on a cluster analysis of Portuguese countryside visitors (N = 866)

derived from a survey applied to a larger sample of the Portuguese population (N = 1853)<sup>1</sup>, this paper aims at understanding the tourism consumptions of the Portuguese countryside by the domestic market, through a segmentation study, highlighting the main characteristics, consumption motivations, representations of the rural and practices of rural visitors.

The paper is divided in six parts. After the introduction, in the second section, the transformation of rural areas from productive into primarily consumable places will be discussed. The characteristics, motivations and behaviours of rural tourists are debated in the third section. The fourth part characterizes the rural tourism activity in Portugal and explains the methodology used to both collect and analyse the data. Results will be presented in the fifth section and discussed in the final part of the paper.

## 2. Rural areas: from agricultural places to consuming idylls?

Rural areas mainly in western countries have been the stage for major socioeconomic changes for some decades now. These changes have been well documented in several research fields, namely geography and sociology (e.g. Argent, 2002; Cloke, 2006; Figueiredo, 2003; Halfacree, 2006; Jollivet, 1997; Marsden, 1995; Nelson, 2001; Oliveira Baptista, 2006; Shucksmith, 2006). These transformations and their consequences, although differently addressed in diverse rural contexts throughout the post-industrial world, are particularly relevant in its most peripheral and remote regions, due to the growing loss of the social and economic role and relevance of agriculture (Cloke, 2006; Figueiredo & Raschi, 2012; Halfacree, 2006; Jollivet, 1997; Nelson, 2001; Oliveira Baptista, 2006; Shucksmith, 2006). The changes are material, visible in territories' configurations and re-configurations (Nelson, 2001; Woods, 2003), but also symbolic, as they trigger new ways of conceiving rural areas and rurality and attribute new meanings and functions to rural areas.

Although we do not intend to recreate here the long-lasting debate about rural transition processes, tourism and leisure consumptions of the countryside have been a key element in that transition. During the last decades, rural territories, particularly in marginal rural regions of the western societies, have been increasingly defined as post-productive spaces or as multifunctional areas in which tourism-related consumptions possess a paramount role (Argent, 2002; Halfacree, 2006; Holmes, 2006; Marsden, 1995; Nelson, 2001; Oliveira Baptista, 2006). As Holmes (2006), Mather, Hill, and Nijnik (2006) and Wilson and Burton (2015) among others, state, post-productivism and multifunctionality are contested concepts with no consensual content among scholars. These concepts have abundantly been used to address what some authors call the 'rural restructuring' (Marsden, Lowe, & Whatmore, 1990; Nelson, 2001; Woods, 2003), to mainly express the transformations in traditional land uses, economic activities and social dynamics (Holmes, 2006; McCarthy, 2005). Post-productivism has been presented (e.g. Argent, 2002; Marsden, Murdoch, Lowe, Munton, & Flynn, 1993) as the transition from an agriculture marked by globalization, intensification and profit-maximization to an agriculture characterised by extensification, relocalisation and conservation (Wilson & Burton, 2015), frequently combined with leisure and recreation and implying the transformation of rural areas' assets into consumable amenities (e.g.

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