



# Domestic demand for tourism in rural areas: Insights from summer stays in three French regions<sup>☆</sup>



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## HIGHLIGHTS

- Activity-based segmentation of rural domestic tourism was conducted for France.
- The profiles of tourists visiting rural and urban areas are very similar.
- Comparing results of three regions showed resemblance of visitors' stay segments.
- Domestic tourist demand for rural areas can be mapped around five stay segments.
- Stays in rural areas generate more expenditure per person than stays in urban areas.

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## ABSTRACT

Tourism has the potential to make a major contribution to the development of rural areas. However, empirical evidence suggests that its economic impact is limited, because rural visitors are thought to engage in few recreational activities and are seen as low spenders. This study gives new insights into the domestic demand in areas of France described as “rural”, with data extracted from the national database provided by the French “tourism demand survey”. The results of the “activity-based segmentation” of visitors' stays in three rural regions show that during the summer season, visits to friends or relatives, which involve little expenditure and no specific activities, continue to take place. However, more expensive stays are the most common. They involve activities aimed at experiencing the outdoors or enjoying local sights, based on natural and cultural amenities that are mainly located in regional natural parks. The main forms of accommodation are campsites and rural cottages. Gastronomic tourism has also emerged as an activity that attracts higher spending visitors. These findings are discussed in relation to the results of segmentation studies in other European countries. Their academic and management implications also are presented.

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## 1. Introduction

The pursuit of sustainable development in rural regions has revealed that tourism is an important area of policy action which

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complements traditional, agriculture-oriented rural policies (Fleischer & Felsenstein, 2000; OECD, 1999; Yagüe Perales, 2002). However, the economic impact of growth in rural tourism remains open to debate (Canoves, Villarino, Priestley, & Blanco, 2004; Dissart, Aubert, & Truchet, 2009; Sharpley, 2002). Optimistic views of the potential for rural tourism development are usually based on the assumption that rural areas are attractive to tourists because of their contrast with the urban world (Lane, 2009). However, rural tourism is primarily a domestic activity, visits to friends or relatives, which often require low spending, account for the majority of trips. Several market segmentation studies in developed countries (Davidson, 1995; Park & Yoon, 2009; Ryan, Hughes, & Chirgwin, 2000; Scottish Tourist Board, 1997; Sharpley, 1996) highlight the relative lack of activities undertaken by visitors to rural areas, who are often happy to relax and enjoy their surroundings. Yagüe Perales (2002)

describes this type of tourism as a “homecoming”, which can be traced back to the beginning of the rural exodus.

Detecting new behaviours and consumption patterns of tourists in rural regions have been the focus of recent studies (Frochot, 2005; Pesonen, 2012; Rid, Ezeuduji, & Pröbstl-Haider, 2014, to cite a few). Their empirical results distinguish new types of tourists who make far greater and more profitable use of the landscape and associated environmental, cultural, and architectural resources. Development of rural tourism could therefore be achieved through a better valorisation of the natural and cultural resources specific to a rural destination. However, simply having these amenities available is not enough – they must be integrated into an economic process that generates added value (Terluin, 2003). Cities and towns usually have more to offer in terms of products and services. These products and services are also more expensive than in rural settings (Thrane & Farstad, 2011). Rural destinations therefore have to invest in facilities and services (accommodation, infrastructures, etc.) to complement natural and cultural amenities (Fleischer & Tchetchik, 2005) to meet the needs and expectations of consumers, while the availability of tourism infrastructure does not automatically lead to development of rural areas (Dissart et al., 2009). To sum up, the spatial distribution of tourist demand results from the heterogeneous nature of consumer preferences, which itself is a product of destination competitiveness (Dwyer & Kim, 2003; Papatheodorou, 2001).

In order that informed public and private investment decisions can be made, there needs to be research into concepts and methodologies allowing integrated studies of supply processes and consumer preferences (Dissart & Marcouiller, 2012; Rosentraub & Joo, 2009). Market segmentation techniques are a powerful tool to identify groups of tourists with similar tastes and preferences (Wedel & Kamakura, 1998). This information can then be used to better adjust supply to demand and to outline supply strategies (Dolnicar, 2008). Although market segmentation of rural tourists has benefited from fifteen years of empirical research (since the early study of Kastenholz, Davis, & Paul, 1999), existing literature is rather limited. Very few previous studies in this field have made use of an activity based approach. One exception is Pesonen (2013). No study has yet been carried out which focuses on the different segments of domestic tourists' behaviour in relation to the competitiveness of rural areas, and the activities, services, and products on offer in those areas. Such a study would be useful to both policy makers and private sector stakeholders, helping them to efficiently target their investments.

The purpose of this paper is to address the appeal of rural areas for domestic tourism in France – one of the world's top tourist destinations. Analysing domestic tourism activities in the country can provide useful new insights. In this study, an in-depth statistical analysis of tourists' behaviour is conducted, with the aims of: i) providing a very detailed statistical portrait of tourism in rural destinations and ii) identifying and profiling different activity-based rural tourism segments. The originality of the study lies in use of a regional comparative approach to identify rural tourism segments and test the validity of the results when clusters are obtained with data from very distinct geographical locations regarding natural and cultural attractiveness, and condition for specific tourist activities.

Detailed data extracted from the French “Tourism demand survey” forms the basis for a behavioural segmentation (Dolnicar, 2008) of rural visitors. This extraction concerns summer stays in 2003, 2005 and 2007 in three French regions: Aquitaine, Auvergne and Rhône-Alpes. At first glance, they appear to play host to very different types of rural tourism. In Aquitaine, where there are a high proportion of rural areas, tourism is centred on the coast. Auvergne, which boasts many outstanding protected areas, still receives

relatively small numbers of tourists. The appeal of the Rhône-Alpes region to tourists is well-established, yet its attractiveness is threatened by the urban sprawl. However, the results of the activity-based segmentation study on tourist stays in the three regions reveal similarities in the demand segments and tourist profiles observed for their rural areas.

This paper makes three main contributions to the recent literature on rural tourism. It is the first to detail a segmentation analysis of domestic tourists in France. Secondly, it builds its empirical investigation on secondary data from national surveys, in contrast with the most common approach, which consists of carrying out research into a single rural destination using researcher-administered surveys. Finally, by applying an activity-based segmentation approach to tourist stays in rural areas, this study contributes to the emerging application of activity segmentation of rural tourism. Before presenting the findings in more detail in Section 4 and discussing these in Section 5, Section 2 will explain the notion of rural tourism demand adopted in the present study and Section 3 will describe the methodology.

## 2. Rural tourism demand analysis: a conceptual framework

### 2.1. Choosing the stay as an indicator of tourism demand

The conceptualisation of rural tourism remains problematic because the associated delimitation is very complicated. The first difficulty is to define the term “tourism”. Because of the many types of travel that exist and the different reasons for these trips, the question of what is considered tourism and what is not is open to debate (Demen-Meyer, 2005). To measure tourism in terms of official statistics, different countries initially sought to distinguish “tourists” from other travellers. However, in doing so they failed to select homogeneous criteria, in spite of regular changes to their data collection systems. Because of this, databases of tourism statistics in France were long developed according to the distinction between holidays and other trips. Since 1994, with the implementation of the “tourism demand survey”, the notion of a “stay” has been used. A stay refers to the place(s) of residence during a trip (a departure and return home with at least one night spent away) made for non-professional purposes. Since the present analysis is derived from this database, it adopts this notion.

Although some academic studies that conduct segment analysis of domestic tourism in rural regions with national survey data do exist, it is important to note that the length of stay is a common measurement of tourism demand in literature relating to tourism economics. This is because this variable is the most closely related to visitor spending (Downward & Lumsdon, 2000; Garín Muñoz, 2007; Garín-Muñoz, Luís, & Montero, 2007) and the choice of activities by nature-based tourists (Mehmetoglu, 2007). Therefore, rural stays may also reflect the preference of visitors for the different types of existing activities and facilities in a particular rural destination and their spending behaviours. This study used the stay as the appropriate notion to investigate and profile the different segments of tourism demand for rural regions, in terms of their competitiveness in providing tourism activities, products and services.

### 2.2. Developing a spatial delimitation of rural destinations

The second difficulty concerns the definition of “rural”. Rural is not an established concept, and remains a default category. Indeed, whatever the method used to define it, rural refers to anything that is not urban. The rural world thus reveals different dimensions – environmental (nature, low population density), economic (small-scale units, the role of agriculture), and historical (traditions, authenticity) – that collectively represent the antithesis of today's

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