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SUSTAINABLE TOURISM MICRO-CLUSTERS: THE CASE OF ALENTEJO PROTECTED AREAS

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Resumo:

Os Sistemas Locais de Turismo (SLT) podem ser analisados com base em conceitos que derivam da economia industrial aplicada aos “distritos industriais”, sistemas produtivos locais ou “regiões inteligentes”. O conceito de SLT constitui uma poderosa ferramenta analítica útil para perceber a estrutura, diversidade e as diferentes formas de organização dos *resorts* turísticos. Os *resorts* podem ser pensados como *clusters* ou “distritos industriais”, representando ou um acordo perfeito entre a esfera produtiva e a comunidade local ou uma mera justaposição industrial sem qualquer ligação económica ou social. Este artigo tenta analisar o processo de criação de *micro-clusters* turísticos baseados em práticas de turismo sustentável. As áreas protegidas do Alentejo - Estuário do Sado; Lagoas de Santo André e da Sancha; Vale do Guadiana; Sudoeste Alentejano e Costa Vicentina; e Serra de S. Mamede – são analisadas com vista à possibilidade de microestruturas específicas permitirem desenvolvimento turístico sustentável. As questões de recursos, competências e da governância são também analisadas.

Palavras-chave: Turismo, Cluster, Micro-Cluster, Sustentabilidade, Desenvolvimento, Alentejo.

Códigos JEL: R1

Abstract:

Local Tourist Systems (LTS) can be analyzed according to a research structure that derives from industrial economics on industrial districts, local productive systems or learning regions. LTS concept is a useful analytical tool that can seize the resorts diversity and organization. Resorts can be conceived both as *clusters* or *industrial districts*, either with a perfect agreement between productive sphere and local community or a mere industrial juxtaposition without any economic or social connection. This paper purposes to discuss how to promote the creation of clusters grounded on sustainable tourism. The Alentejo Protected Areas - Estuário do Sado; Lagoas de Santo André e da Sancha; Vale do Guadiana; Sudoeste Alentejano e Costa Vicentina; Serra de S. Mamede - are analyzed under the principle of how specific microstructures can allow for a sustainable tourist development. The issues of “resources and competences” and “governance” are also explored.

Keywords: Tourism, Cluster, Micro-Cluster, Sustainable Development, Alentejo.

JEL Codes: R1

Introduction

This paper examines a specific pattern of sustainable tourism, i.e., the development of recreational and leisure activities in protected areas taking, as a case study, the Alentejo Region. Some theoretical reasoning over the concept of sustainable tourism is presented and, by extension, how it can bring answers to some of the challenges posed by the development needs in poor regions. When we consider the Portuguese Territory as a whole, it is clear that - with the notable exception of Algarve's coastal areas -, the southern part of the country has always been a less developed region. This feature is even more visible, if we compare Alentejo with other parts of Portugal, namely the so-called Braga-Setúbal axis¹.

The inexistence of a truly industrial development associated with the loss of agriculture's relevance and with the problems generated by a long term process of ageing population, made Alentejo a critical area in terms of sustainable economic development. Across the years, successive policies tried to come up with a valid approach²: unfortunately, when we take a closer look to how Alentejo performed in recent years, we can easily conclude that this region was not able to reduce the *decalage* from Portugal's most developed regions, namely Lisbon Metropolitan Area (see CEVAL, 2007 and INE, 2007a).

In these last fifteen years, tourism emerged as the best approach to promote the economic growth of Portugal's less developed regions³. More specifically, and in particular for regions with Alentejo's characteristics (a region that concentrates several elements with cultural and natural value), sustainable tourism started to be seen as an important economic strategy, both at regional and local levels. In this paper, we argue that's particularly the case of Alentejo Protected Areas.

The analysis starts with an attempt to define sustainable development (Part 1), followed by a brief review of tourism activity in Portugal (Part 2), complemented with a short description of Alentejo

region, with a special focus on its protected areas - parks and natural reserves (Part 3). Theoretical issues on tourist clusters are discussed (Part 4) which will allow for a better understanding of sustainable tourism in Alentejo Protected Areas (Part 5).

1. On Sustainable Tourism – elements for a definition

As a first attempt towards a definition, one can argue that *“sustainable tourism is a positive approach intended to reduce the tensions and frictions created by the complex interactions among the tourism industry, visitors, the environment and communities which are host to holiday makers”* (Journal of Sustainable Tourism, 1993). In this sense, tourism will always imply both a specific pressure over local resources and a form of turbulence in terms of local communities traditional pattern of living. This way, it seems clear that if tourism implies an idea of multiple agents interacting in a particular region, any possible definition or concept of sustainable tourism must include an approach to the effects caused by the pressure and turbulence previously mentioned⁴.

On the other hand, as Shaw and Williams (2002) stated, sustainable tourism should also involve a particular concern with the long term viability and quality of both natural and human resources. Therefore, resource management seems to play a fundamental role when it comes to a valid sustainable tourism strategy. As Neto (2002: 10) argues, *“the promotion of national strategies for sustainable tourism development, including the decentralization of environmental management to regional and local levels, can be seen as one of the main policy areas regarding sustainable tourism”*. As the idea of *sustainability* carries a time frame dimension, unsurprisingly, one of the best definitions conceptualizes sustainable tourism as *“tourism and its associated infrastructures that, both now and in the future, operate within natural capacities for the regeneration of and future productivity of natural resources”* (Eber 1992:3).

¹ Alentejo purchase power is only 85,6% of Portugal's average.

² As an example, we can mention Alentejo regional plans.

³ See the several National Tourism Strategies and, in particular, the PENT (Plano Estratégico Nacional de Turismo – National Strategic Plan for Tourism).

⁴ See also, Neto 2002.

In the same direction, the World Tourism Organization has defined sustainable tourism as an *“enterprise that achieves an effective balance among the environmental, economic, and socio-cultural aspects of tourism development in order to guarantee long-term benefits to recipient communities”* (USAID: 1).

Taking into account that sustainable tourism always includes a set of economic relationships between tourists, agencies, local communities, public sector and enterprises, one of the key problems to address is the creation of tangible, working local partnerships (Commission on Sustainable Development, 1999). Networking is to be the “word” where sustainable tourism is concerned⁵. A correct strategy should be build upon partnership, involving all interested parties (Eagles, McCool and Haynes, 2002).

Sustainable development is a vital element for the survival and viability of tourism and for the protection of natural and cultural environment. Protecting environment for the main reason of sustaining tourism is perhaps not an ideal nor a responsible objective: according to Harris and Leiper (1995), a more appropriate and conscientious approach would be to use tourism as a means to protect the environment and sustain biodiversity. That way, sustainable tourism could include all kinds of tourism that contribute to sustainable development (de Kadt, 1990). However, Dutton and Hall (1989) recognize that there are certain preconditions for achieving a sustainable approach to tourism planning like cooperation, industry coordination, consumer awareness of sustainable and non-sustainable options, strategic planning and commitment to sustainable objectives.

In summary, sustainable tourism can be perceived as a complex concept, which should include the following elements that must be present:

a) Long term approach – when we consider the long run tourism important and relevant trends are better perceived;

b) Respect for local communities – local communities are a main actor in terms of tourism development. In fact, if some important natural and cultural values exist and remain across time, that is the responsibility of local communities. Therefore, local leaders must have some specific role in any empowerment strategy;

c) A particular concern with local cultural values – cultural and natural resources are the main feature of the tourist offer in protected areas;

d) Positive interaction between tourists, local communities, public sector and private enterprises. Usually, sustainable tourism investments tend to be concentrated in regions with lower economic performance. Therefore, they carry a set of positive links that enhance the region competitiveness. The creation of a network that should create favourable local conditions to promote sustainable economic growth is the main issue.

2. The Tourism Activity in Portugal

Tourism is one of the most important sectors in Portuguese economy. It represents 11% of GDP and 10% of total employment (2007). According to the “World Wide Travel and Tourism Council” (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 (INE, 2007). Spain contributes with 22% of the total. United Kingdom comes second with 20%, France with 13% and Germany with 11%. 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 38% of total overnight, followed by Lisbon with 22% and Madeira with 15%. Alentejo region represents only 3% of the total. Despite a considerable growth in the last few years, this region maintains a low attraction record. 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.

⁵ See also “Towards Earth Summit”, 2002.

Despite the fact that Alentejo has the lowest hotel capacity of all Portuguese regions, when Rural Tourism (TER)⁶ 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 assets mentioned above. Statistics also show that the number of lodging-houses (or country-houses) is the highest of all 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.

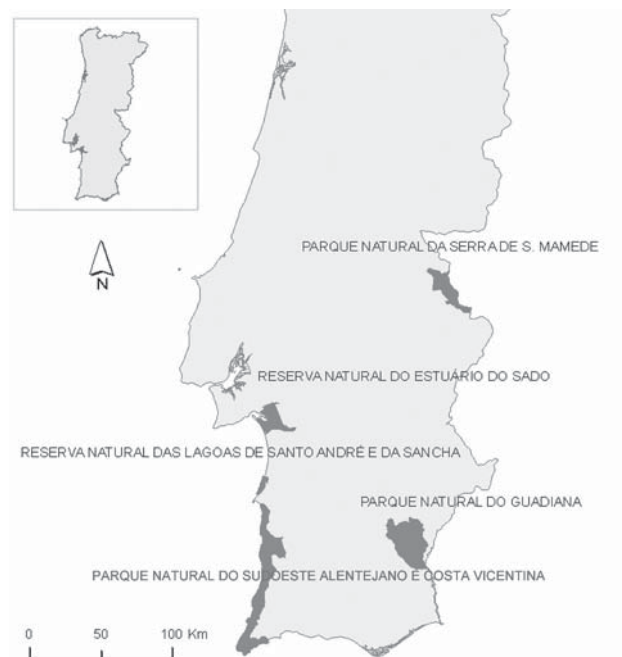
The beautiful and more untouched landscapes, its rural features and one of the lowest (twelve months) tourist densities among Portuguese regions created also *"une certaine atmosphere"* for the investment. Over the last few years, national and international investors became more visible and larger tourist projects are growing, namely around the Alqueva Dam Lake in the eastern part of Alentejo.

3. 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 in reserves and Parks highlight the natural features as the major potential for this type of tourism: geographical location and natural environment (in which we can include the landscape); 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. A brief presentation of the main protected areas and reserves in Alentejo Region (figs.1 and from 1.1 to 1.5) is made in the following pages.

FIGURA 1

Location of protected areas and reserves in Alentejo Region. (The authors chose to maintain the names in Portuguese)

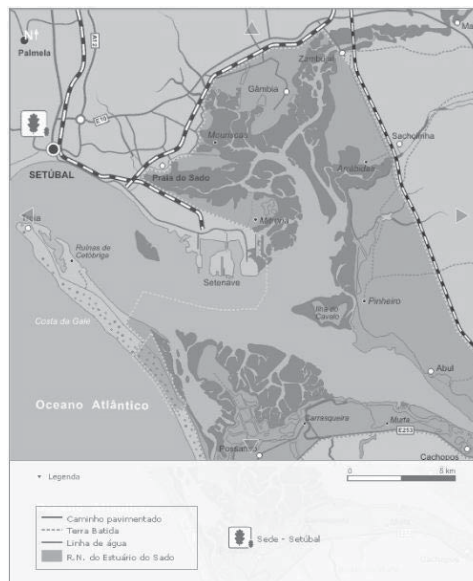


⁶ Portuguese definition for Tourism in Rural Space (Portuguese Law – DL 39/2008, March 7th) includes hotels, tourist villages, tourist apartments, resorts, house tourism hotels, rural tourism hotels, camping and caravan sites, nature tourism hotels.

FIGURA 1.1

Reserva Natural do Estuário do Sado (RNES)

Area	▪ 23.160 ha
Councils	▪ Alcácer do Sal ▪ Grândola
Year of creation	▪ 1980
Number of tourist units	▪ Alcácer do Sal - 14 ▪ Grândola – 11
Main Interests	▪ Botany ▪ Fauna (with ornithological and ictiology)

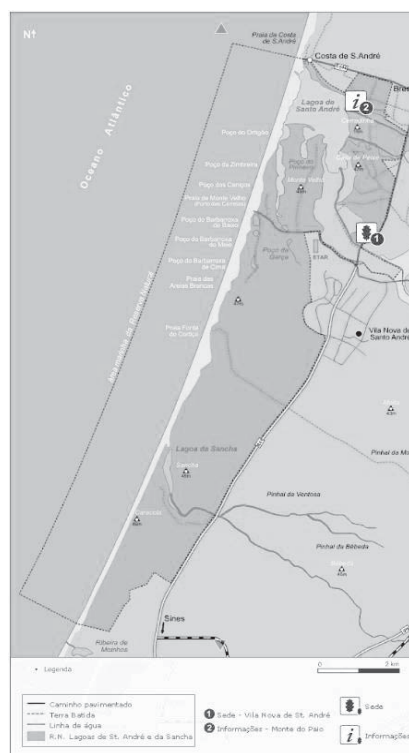


Source: ICNB, 2009

FIGURA 1.2

Reserva Natural da Lagoa de Santo André e Sancha (RNLSAS)

Area	▪ 5.247 ha
Councils	▪ Sines ▪ Santiago do Cacém
Year of creation	▪ 2000
Number of tourist units	▪ Sines - 10 ▪ Santiago do Cacém - 11
Main Interests	▪ Wetlands (important for breeding, wintering and migration of birds) ▪ Dunes ▪ Sea lane ▪ Marine fauna

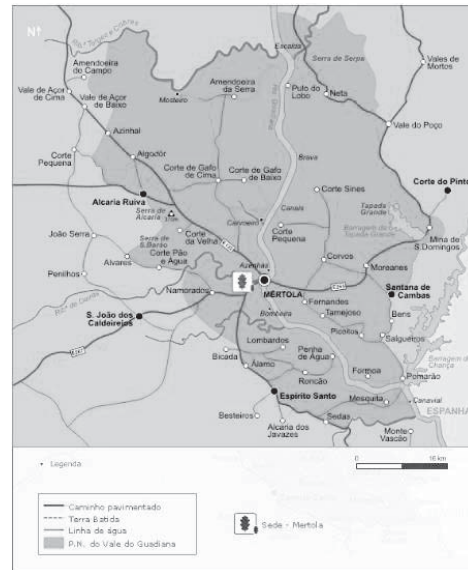


Source: ICNB, 2009

FIGURA 1.3

Parque Natural do Vale do Guadiana (PNVG)

Area	• 69.773 ha
Councils	• Serpa • Mértola
Year of creation	• 1995
Number of tourist units	• Serpa - 14 • Mértola – 8
Main Interests	• Fauna • Flora • Geomorphology • Landscape • History and Culture



Source: ICNB, 2009

FIGURA 1.4

Parque Natural do Sudoeste Alentejano e Costa Vicentina (PNSACV)

Area	• 76.000 ha
Councils	• Sines • Odemira
Year of creation	• 1980
Number of tourist units	• Sines – 10 • Odemira – 26
Main Interests	• Coastal habitats • Flora • Endemic fauna (with ichthyofauna and birds) • History

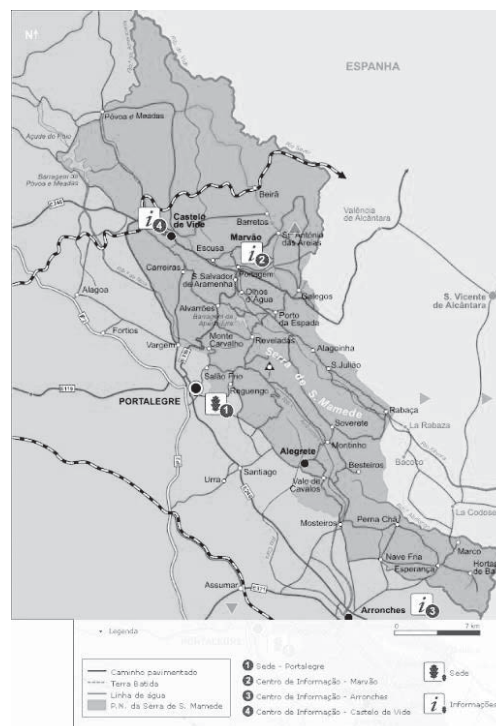


Source: ICNB, 2009

FIGURA 1.5

Parque Natural da Serra de São Mamede (PNSSM)

Area	• 55.524 ha
Councils	• Marvão • Castelo de Vide • Portalegre • Arronches
Year of creation	• 1989
Number of tourist units	• Marvão - 31 • Castelo de Vide - 17 • Portalegre - 16 • Arronches - 0
Main Interests	• Compatibility between human activities and ecosystems dynamics



Source: ICNB, 2009

4. Theoretical Approach to Tourist Clusters

4. 1 Porter “Diamond” Model

Clusters emerge spontaneously, based on market forces interacting on a variety of activities. The process of cluster formation occurs naturally as firms, infrastructure investments, logistics, etc. respond to local needs. Given such spontaneous economic processes responding to market, should clusters be left alone in a process of natural development?

In the beginning of the 80's, Michael Porter schematized the functioning of these geographical concentrations through the famous four points “Diamond Model”:

- “Factor conditions” – the natural and constructed elements (natural resources, workforce, infrastructures, institutions, universities). The quality of the main production factors is the first issue for the cluster development framework.

- “Demand conditions” – disclose the demand conditions for products or services. Through its analysis, firms preview the foreseeable evolution of markets and try to cope with the consumers’ desires. Demand stimulates innovation, the search for new production methods and the climb along the value chain.

- “Related and supporting industries” – these activities offer other products and services, directed to a similar demand that can also interact both with the clients or the firms’ cluster. Geographical proximity enhances the benefits generated from the exchange of ideas and innovations.

• “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. 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).

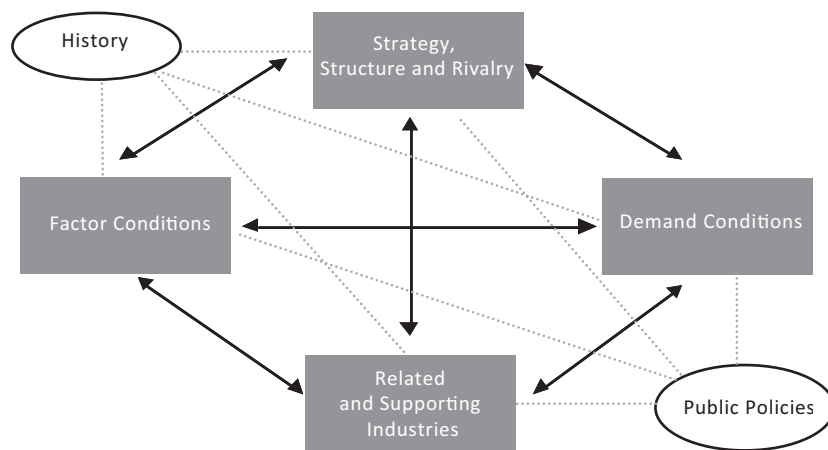
In order to complete the diamond systemic nature, Porter still included two external factors to the cluster: public policies and historical hazards (Fig.2).

This scheme should be analysed in a systemic way, as the effect on one of the four main elements depends from the others’ conditions.

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 (fig.3).

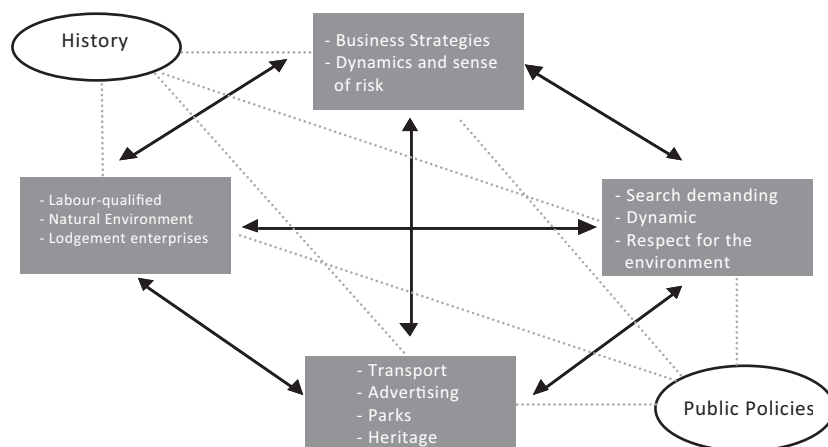
Government has an important role in assembling information about cluster composition, membership, employment and performance. Such information allows for public policies and public investments to

FIGURA 2
Porter “Diamond” Model



Source: Porter, M. (1990)

FIGURA 3
The Porter “Diamond” Model applied to Tourism in Protected Areas



Source: Authors

be better aligned with business needs, based on the cluster composition in each location and region. This will make public policy effective. Cluster information will also increase the efficiency of private sector investment and foster the rise of new businesses.

Another potential role for government in cluster development is to *convene* cluster participants. Once clusters are organized in trade associations or other forms, government agencies need to become active participants in dialogs with cluster participants to understand local constraints to productivity and identify gaps and weaknesses in public policy.

Enhancing cluster externalities and knowledge spillovers will increase productivity and prosperity, providing higher levels of territorial competitiveness.

In Porter's diamond model, history or chance can explain why development or some industries appear in that place or in those orders. The same way, Alentejo with its landscape, natural environment, climate and heritage, may have arrived at a moment in its history where tourism can be the solution to its development.

4. 2 The specific case of Tourist Clusters

Taking into account the written above, one must ask if it is possible to transfer the cluster concept to the tourist sector.

According to Porter's initial definition, clusters are *"geographic concentrations of interconnected companies, specialized suppliers, service providers, firms in related industries, and associated institutions (universities, standards agencies, and trade associations) in particular fields that compete but also cooperate"* (Porter, 1990a: 78).

When it comes to tourism, however, several issues have been raised such as the adequacy of the "original cluster concept" and the type of framework that it will be required in order to give an internal logic according to the principles and methodologies of the Porter model.

Even if Porter's model has been used extensively to analyze industrial sectors, it is valid to argue that *"such a definition could be used also to describe a destination, with its conglomeration of competing and collaborating businesses, generally working together in associations and through partnership marketing to put their location on the map. Porter, in fact, has used a tourism-related cluster as one of many examples of clustering in practice, citing the "California wine cluster"* (Jackson and Murphy, 2006:6).

Recently (Michael, 2007a), several authors proposed that the most adequate methodological concept to support an analysis of tourist activities based on the cluster approach should be related with the idea of *locality*. This means that tourist analysis and studies should rely on the so-called *"niche markets, taking into account that the problems and issues in this sector do not concern large-scale regions but rather smaller localities and their communities"* (Michael, 2007a: 2).

In this paper, it is argued that the traditional/"industrial" cluster concept might not be the most adequate tool to study natural parks potential. As such, we believe that a recent theoretical trend in which the concept of *micro-cluster* has been under discussion, represents an interesting approach.

According to this perspective, *the term "micro-cluster" refers to the geographic concentration of a small number of firms in a cohesive local environment, where the complementary interaction between those firms contributed to an enhanced level of local specialization"* (Michael, 2007a: 2,3). In this sense of the word, *locality* will derive from a specific local context and a unique identification of the tourist product (Michael, 2007a: 3).

This way, and as Jackson and Murphy (2006) pointed out, the application of the micro-cluster concept to the tourism industry is extremely appropriate given that the product interacts with the local bases, promoting joint actions of inter-related companies, leading to the formation of competitive agglomerates, that operate at a local/subregional level. The relevance of the local scale can be better understandable, if we consider that knowledge about place and the nature of local practice is not tradeable nor relevant outside *the place* (Maskell, P. and Malmberg, A, 1999). Therefore, the fundamental connection between Tourism-Place-Competitiveness is at the heart of a potential tourism cluster. The "Tourist Offer" has only a particular meaning as long as we take a closer and deeper look into local values and resources.

In order to make a micro-cluster approach a valid tool, it's important to remember that *networking* is usually one of the keys to make a cluster strategy a success. In fact, *locality and place* are only a necessary, but not a sufficient condition, to promote, in an efficient way, the value of cooperation. Geographical proximity does not guarantee *per se*, the appearance of a strong

network of institutions. One can argue that locality creates the opportunity, but does not change previous patterns of entrepreneurial individualism. This means that complementary work in terms of building a true competitive network of firms and institutions is also a requirement in a micro-cluster approach. As Dixit and Nalebuff (1991) clearly stated, firms have a lot to gain through cooperation in a specific location in order to compete in a broader market.

According to Michael (2008), research on tourism micro-clusters must focus the following main aspects: economic growth /strategic planning; geography and location analysis (synergies); marketing (co-operative programs) and microeconomic management (niche markets that generate a demand for travel) that foster local development. In this context, it is visible that one of the main advantages for a micro-cluster approach lies on the fact that small communities can have some control over the economic development process.

The renewed interest in tourism, as a means to support regional and local economic strategies might also be explained by the fact that tourism is perceived as a global solution. It contributes to regional growth and employment; it uses local resources and has strong multiplier effects. So, as geographers refer to it, “functional paradigm” was replaced by the “territorial paradigm”. I.e., the older model of regional equalization was replaced by the new concepts of territorial competitiveness and decentralization of resource allocation decisions, in order to reverse the declining trend, normally observed in regions with a long term economic decay.

5. Inquiries results analysis

5. 1 Introduction

Aiming at the assessment of sustainable tourism's importance in Alentejo, a series of telephonic surveys was conducted to several lodgement enterprises operating in the region's municipalities with Protected Areas. Councils from the 104 contacts established, only 66 were effectively conducted. Thus, that is the total number of contacts used further on.

The survey applied was rather synthetic. In order to avoid incoherencies and doubtful interpretations, we privileged the use of closed questions, more objectively and synthetically treatable. The inquiry was structured in seven different thematic domains:

- A – Firms identification;
- B - Suppliers;
- C – Employment;
- D – Relative and supportive sectors;
- E – Strategy, structure and competition among firms;
- F – Client Markets;
- G – Public Politics.

To assess the users' profile of Alentejo nature tourism, a questionnaire was also carried through in the units classified and licensed by the natural areas municipalities. The questionnaire used was synthetic, with a majority of closed answers, helping in the results treatment.

In the total, 152 surveys⁷ were conducted in the five natural sites, distributed as follows: PNSSM - 48; PNSACV - 34; PNVG - 37; RNES - 9; RNLSAS - 20.

The five Protected Areas Managements 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 results are presented jointly, following the Porter model adopted to sustainable tourism, as mentioned above.

5. 2 Factor Conditions

5. 2.1 Firms Identification

The inquiries to the firms present the following distribution per park (fig.4): from the legal point of view, 91% of the 66 inquired firms are “independent entities” (53), 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”). With the exception of “Pousada de Santa Clara” (in Odemira), all the inquired firms are Portuguese and private owned.

⁷ But only 148 inquiries were validated.

5. 2. 2 Employment

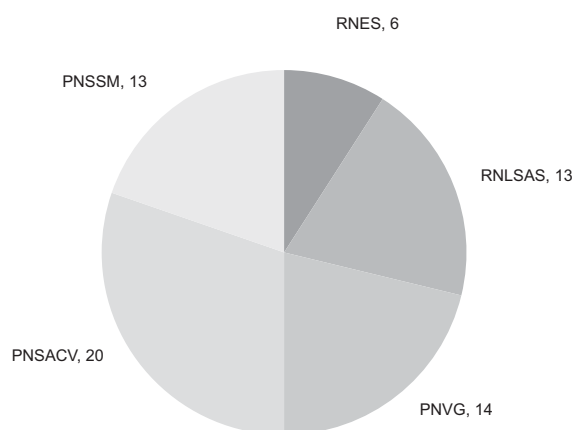
The great majority of lodgment units – specially the smaller ones, functioning as Rural Tourism – use a multitask approach to their employees. That's specially the case for cleaning services (around 90% of the sample) and marketing, promotion and publicity (82%).

There is great variability in the number of employees per lodgment unit. 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 for the job performed. It's particularly the case of those working in areas such as cleaning or kitchen. Normally, the small businesses are organized as family businesses. Even so, approximately $\frac{1}{4}$ of the people working in the lodgments can be considered as specialized personnel (Fig.5).

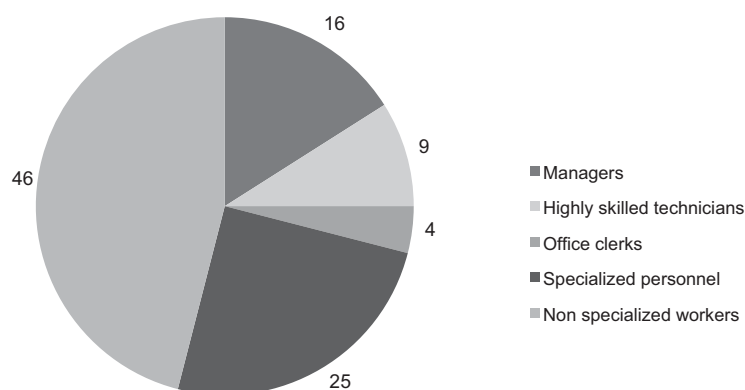
The survey also shows that 60% of the businesses owners or director managers have a high level of education (graduate level). The remaining 40% have an undergraduate level (medium degree).

FIGURA 4
Number of inquiries conducted per Protected Areas



Source: Authors' questionnaires

FIGURA 5
Workers Distribution by Training Categories (%)



Source: Authors' questionnaires

5. 3 Demand Conditions

In the total 73% of the clients are Portuguese, 5% belong to the region and 22% are foreigners.

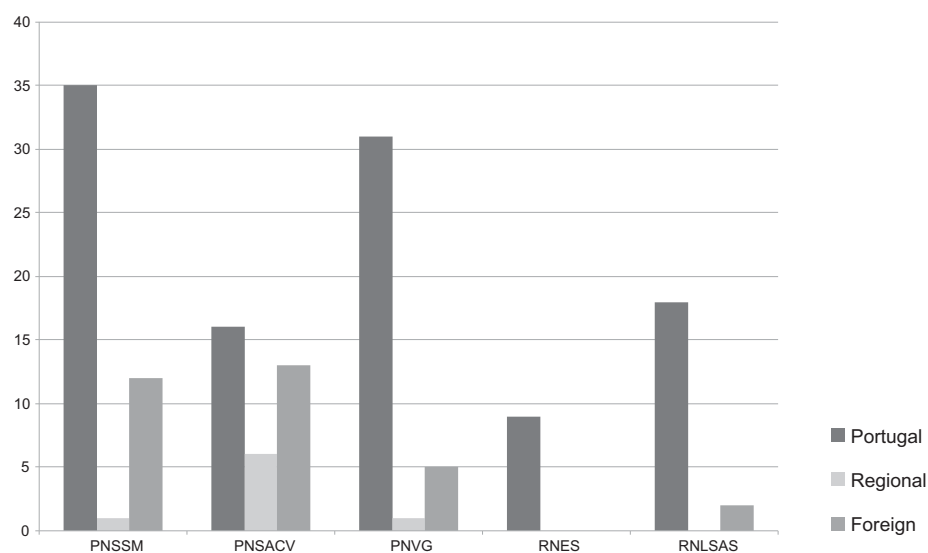
On an individual analysis, at RNES all the inquired people are Portuguese. PNSSM and PNSACV were the two parks where the percentage of foreigners was higher (Fig.6).

In what gender is concerned, 59% of the inquired are men and 41% women. The RNES has 56% of women and RNLSAS only 30%. The remaining natural areas follow the average. The inquired

average age is 46 years and in all the natural areas the age is around 40 years old, except for PNVG, with 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. 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 RNLSAS and PNSSM). Then, the protected areas clients' majority has a university degree (Fig.7).

FIGURA 6

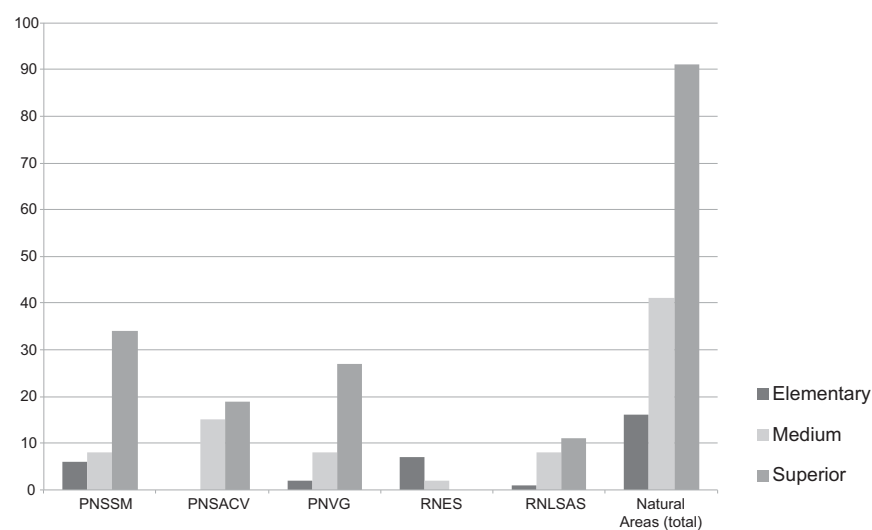
Inquiries Origin by natural area



Source: Authors' questionnaires

FIGURA 7

Customers level of education by natural area



Source: Authors' questionnaires

To the question on the reasons to choose Alentejo as a 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 PNVG or a jazz festival in Portalegre (PNSSM) can act as attraction elements in the regional context. Historical and architectural sites also play an important role, namely in PNSSM (where 3 important castles are located).

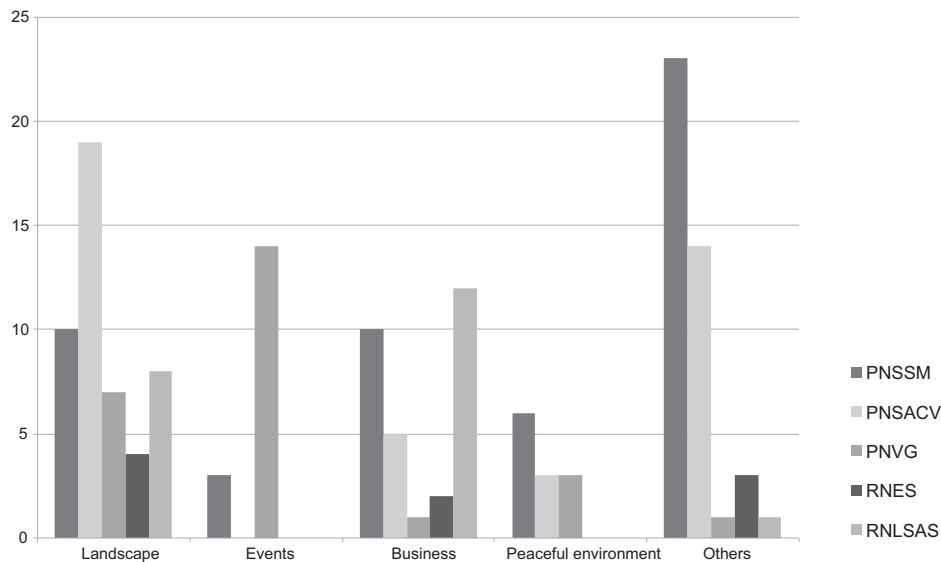
As we can see, leisure is the main reason to visit these areas. This is true to all the natural areas under consideration, with the exception of Santo André and Sancha Lagoon Natural Reserve where business was pointed out as the main factor. Consequently, it is in this Reserve that the average stay is higher (6 nights) (fig. 8).

The Southwest Alentejo and Vicentin Coast Natural Park (PNSACV) 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. In the total, the average is 3.6 nights.

On the information source about Alentejo natural parks, the answers pointed to Internet, friends and family. There are also some references to the workplace or colleagues. On the question of the activities, they are diverse and varying, but in total, the most popular category is “other activities”: rest, walk, cuisine. Sports also attract many people (specially those who focused on water activities such as surfing, windsurfing or swimming) as well as hiking and interpretative pathways. Culture presents some relevance (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.

FIGURA 8
Reasons for choosing Alentejo and a particular natural area



Source: Questionnaires.

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 sports (fig. 9).

To the question whether they intend to return, only two people answered negatively in the Guadiana Valley Natural Park (PNVG). Many say they only intend to return, under the condition that Alentejo does not change dramatically in the coming years.

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

5. 4 Related and Supporting Industries

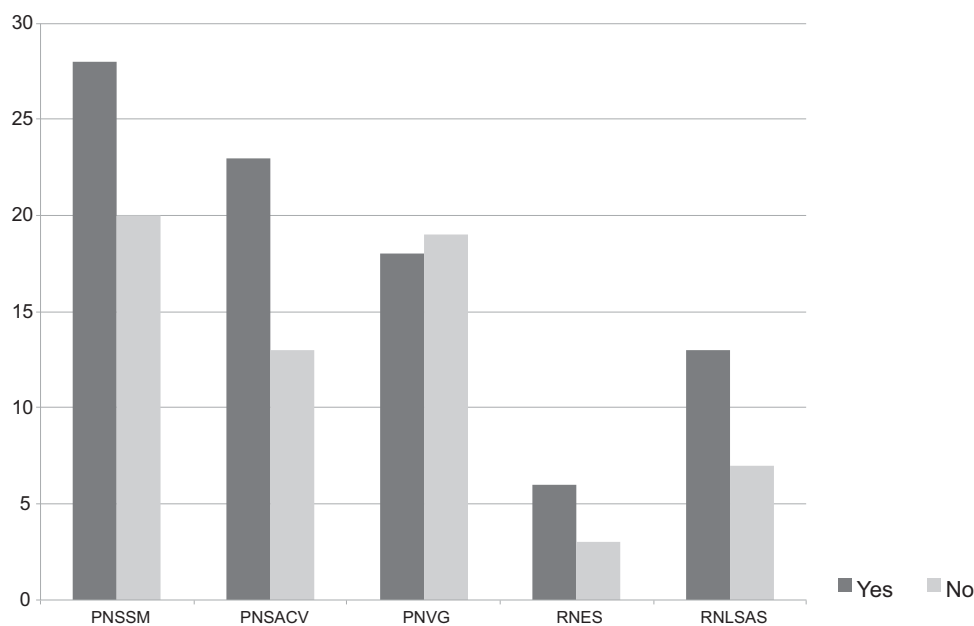
Around 85% of the inquired units believe to depend on related and supporting industries in order to be

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 (PNSACV) (Fig.10).

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 couples – mostly foreigners –, as an alternative to the traditional sun and sea.

Among the factors mentioned by firms, relevance to Meetings & Incentives (normally pointed out by the lodgements near São Mamede Mountain Natural Park. Sports and cultural events in the various councils are also commonly mentioned. In bigger lodgements, the use of regional public/private services, such as local transports like taxis or cleaning services, present a greater regularity.

FIGURA 9
Nature Tourism Habit



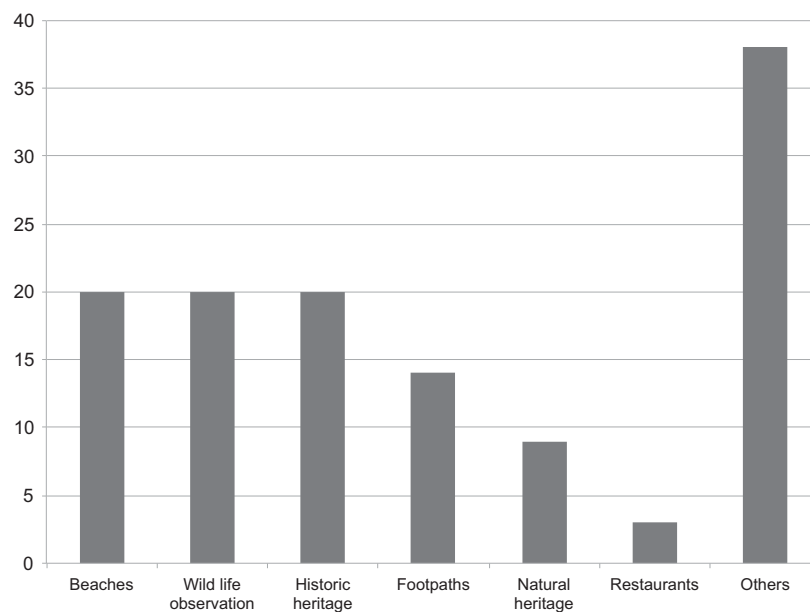
Source: Authors' questionnaires

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 local cluster cohesion.

Law and financial services are mostly guaranteed by regional suppliers.

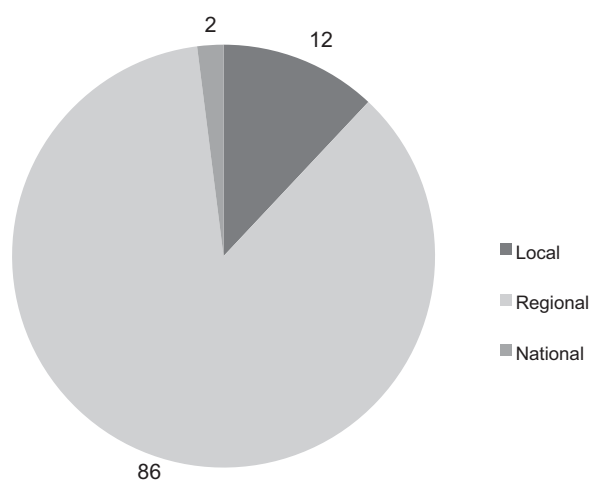
Tourism animation is the sector where clearly lies the highest propensity to partnerships. At least 91% of the inquired firms make regular associations with other local/regional agents in order to offer a wider and more articulate list of leisure activities to their clients (Fig.11).

FIGURA 10
Recognized factors of success by units



Source: Authors' questionnaires

FIGURA 11
Suppliers of tourism animation according to different geographical ambit (%)



Source: Authors' questionnaires

5. 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 animation sector (and, more informally, with restaurants), namely with local/regional enterprises. In some cases it is 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 66) 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 associations.

A similar situation can be verified in the partnerships with "tour operators": more than 1/3 of the units cooperate with national operators. Also more than 1/3 of the lodgments cooperates with national travel agencies. Approximately 22% do not cooperate in any kind of distribution and placement channel (Fig.12).

5. 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.

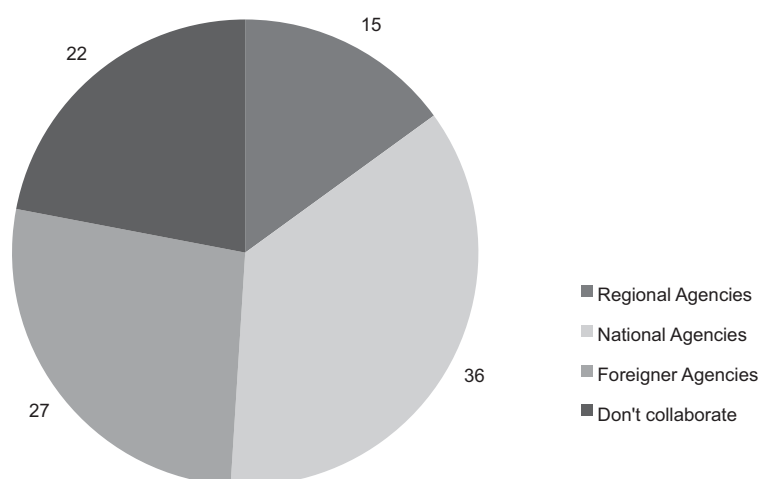
Even so, the most identified problems (36%) concern the tourism sector itself. Seasonality and the weakness (or even inexistence) of public municipal policies (e.g. the promotion of the municipality as a tourist destination) are among the main problems (Fig.13).

The difficulty to find specialized workforce bureaucracy, lagging period to obtain licensing papers and the lack of intra-firms cooperation are also identified as problems.

The consequences of the current World economic crisis concentrated 31% of the answers.

Protected Areas management problems are also mentioned repeatedly. Entrepreneurs view the Protected Areas' organizational structure in a general negative perspective, particularly what concerns the inexistence of cooperation strategies between Protected Areas and firms. The existence of Protected Areas promotional material in the lodgment reception

FIGURA 12
Cooperation with travel agencies at different geographic scales (%)



Source: Authors' questionnaires

areas is the only connective element between the two entities (parks and firms). As far as we could be aware of, there are no specific relationship channels between them. To avoid partial judgments, we transcript some of the critiques pointed out:

“Best Western Hotel – Porto Covo” - *“The natural park does not give us the support that they should.”*; “Refúgio da Praia (Rural Tourism – Porto Covo) - *“In the last two years I have been trying to cooperate with the park but without results. I think mainly due to political questions”*; “Hotel Vila Park – Santiago do Cacém” - *“I do not recognize advantages of belonging to a natural park... I will tell you why... I asked for the ICNB’s [the official regulatory entity of a specific park] support in order to promote bird watching activities among my clients and I did not get any answer. Besides that, we had around 10.000 trees to give to ICNB to plant wherever they wanted to in Portugal and they didn’t want them”*; “Hotel Monte da Lezíria – Santiago do Cacém” - *“We have a good relationship with the park’s management but we would think there would be a great benefit if ICNB adopted a more commercial managing system to the parks. The booking of guided visits to the parks is quite limited and heavily dependent on the presence and availability of human resources”*.

On their part, protected areas managers argue that they make some cooperation with local authorities and with tourism officials. Parks directors argue that it is not their role to promote common strategies with other parks.

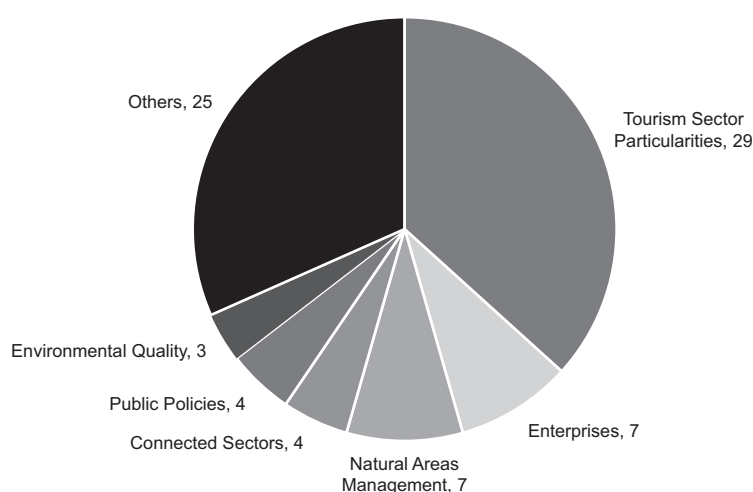
Entrepreneurs present a wide variety of perspectives. Except for one or two rural tourism facilities (e.g. “Monte das Faias” in Grândola), all the answers point to increasing difficulties in the near future. In short, entrepreneurs adopt one of the following three distinct behaviors:

1. The ones that will try to redefine their position in the market by:

- Creating more services (aim to attract more tourists and per capita spending) like spas, restaurants or capacity increase;
- Creating cooperation protocols, in order to offer more (and thematically wider) leisure opportunities;
- Redefining their position in some markets, namely the Nordic, through agreements with foreign Tour Operators.

2. Those that “will wait and see” to what the future might bring, maintaining (for now) their business and commercial strategies.

3. The ones that assume to have “given up all hope” in their businesses and are considering to shut



Source: Authors' questionnaires

off, claiming that the demand is going to decrease, affecting the sustainability of their core business.

When questioned about the Strategic Plan for Tourism, Nature Parks managers were unanimous to agree that Alentejo should be a priority for tourism promotion. Tourist and sport nature firms share the same point of view, arguing that Alentejo has a great potential for this type of sustainable development.

Protected areas management calls for the importance of increasing average stay, saying *“it is more advantageous for a protected area, have a visit from a person seven days of that seven people in one day”* (N. R. Sado Estuary).

The SWOT matrix shows Alentejo's high potential to develop a tourism strategy based on its endogenous natural resources, such as architectural values, parks and reserves. Nevertheless, it's absolutely vital to define a set of goals that will allow Alentejo to surpass

the major threats and to reduce the main weaknesses, such as the lack of cooperation between tourism economic agents. This is an important challenge for Alentejo's near future (Table 1).

6. Final Conclusions

1 – Tourism can be considered a basic strategic axis to Portuguese sustainable development. But not all kinds of tourism are adequate to present concerns on heritage, landscape preservation and community values;

2 – Over the last few years there's been a strong increase in the number of investments in sectors not related with “Sun-Beach” main core: these investments are located mainly in the inner parts of the country, with low population densities, which is the general case of Alentejo.

TABLE 1
SWOT Matrix – Alentejo Protected Areas

Strengths	Weaknesses
<ul style="list-style-type: none"> Existence of five natural areas with great potential for global population; Existence of a large number of tourism units in natural areas; Natural and cultural landscape, wealthy cuisine; Attractive beaches and coastal areas; Fauna, flora and attractive habits; Ability to adventure sports. The proportion of registered foreign guests is high, showing some power of attraction over the high consumption market of nature and sustainable tourism; Suppliers are in most cases regional. 	<ul style="list-style-type: none"> Lack of cooperation among firms, tour operators and natural parks; Existence of low supply of nature oriented activities; Dependence from the national market (without much of a motivation for travel); Largely seasonal tourism (not always the height of summer is the richest and most suitable for visiting the parks / nature reserves); Lack of specialized staff ; Weak accessibilities; Reduced number of beds for tourist purposes; Environmental sensitivity; Little awareness of the existence of natural areas; Low environmental awareness; Low entrepreneurship and disclosure of protected areas; Low use of local potential.
Opportunities	Threats
<ul style="list-style-type: none"> Increased national (European and world) awareness to the importance of preserving the environment, induces the extension of the market segment of tourism travel and the nature of touring and cultural landscape; Nature tourism as a different product; Increasing activities related to nature sports; 	<ul style="list-style-type: none"> Competing national and Extremadura (Spain) destinations, with better marketing; International crisis, which retracts the potential for travel to the markets of fitness "nature"; National and international destinations with certain similarities and better marketing strategies; Over-marketing can generate mass tourism; Risk of environmental degradation.

Source: Authors

3- Alentejo has a strong cultural character and a considerable geographical dimension. Its heritage, natural landscapes and the existence of an important network of natural areas gives the necessary support to a regional strategy. Parks and reserves are a value-added resource that deserves to be included in a regional and national tourism strategy when it comes to a sustainable tourism approach.

4- 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 (PENT, 2007). But can we conclude that Alentejo is considered one of the main elements in this new national strategy? The answer is not obvious: 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 missing⁸.

5- The best strategy for the development of this type of tourism in Alentejo is through the creation of micro-clusters. In order to do that, strengths and opportunities must be seized and weaknesses and threats must be fought.

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⁸ According to PENT, one of the main challenges to Portugal, it will consist in developing a sustainable tourism offer. In here, the main issue is to guarantee a more attractive tourist product, but keeping sustainable objectives in mind (PENT, 2007).