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Editorial

Rural tourism experiences. Land, sense and experience-scapes in quest of new tourist spaces and sustainable community development

Elisabeth Kastenholz* and Elisabete Figueiredo**

University of Aveiro (Portugal)

The special issue on “Rural tourism experiences” is one outcome of the International Conference on Rural Tourism entitled “*Re-inventing rural tourism and the rural tourism experience - Conserving, innovating and co-creating for sustainability*” that took place in early September 2013 at the University of Aveiro, Portugal. The conference was a milestone at the end of a 3-years research project undertaken in 3 Portuguese villages (Favaios, Janeiro de Cima and Linhares da Beira), with the collaboration of 15 researches from 7 distinct Portuguese institutions, 4 research assistants and 5 master students at the University of Aveiro, and one international consultant (Bernard Lane), who critically discussed with us and confronted findings with those from diverse studies in other contexts and parts of the world.

The relatively broad interest and active participation in this “home-made”, specifically themed event, not integrated in any large-scale association, network or professional organization of continuously held and internationally acknowledged conferences in the tourism or rural development field, confirms the existence of a dynamic research community addressing rural tourism issues from very distinct perspectives, and analyzing them in quite distinct contexts. After a process of double (sometimes triple) blind reviewing, we were very pleased about the final result, with 168 authors

contributing to 80 accepted presentations. At the Conference, 85 authors contributed to the debate with 62 paper and 17 poster presentations, reporting research from 23 countries (book of abstracts available from- http://cms.ua.pt/orte/sites/default/files/book_abstracts_27ago.pdf). Discussions at the conference, together with very interesting keynote presentations (by Bernard Lane, Keith Halfacree, Richard Sharpley, Nancy McGehee, Hio Jung, Apolónia Rodrigues and Elisabeth Kastenholz), were most inspiring and some of the papers were selected for special issues of three journals (Journal of Sustainable Tourism, Revista Portuguesa de Estudos Regionais and Pasos - Journal of Tourism and Cultural Heritage). A *Cambridge Scholars Publishing* book with some of the conference contributions, directed at an international audience, is still in preparation.

This special issue elaborated for PASOS is based on a selection of papers with a main focus on social, anthropologic and cultural themes, and a particular emphasis on community and sustainability implications of new experience- based tourism production (or rather co-creation) in rural territories, in a context of transformation of the rural space, presenting additionally particular cases from diverse geographical and cultural contexts.

Indeed, studies looking at distinct themes, from diverse scientific perspectives, reveal dis-

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tinct realities in Portugal, Poland, Italy, Australia, Jamaica and Brasil. All authors were invited to present improved and extended versions of their conference papers with a particular reviewing process, undertaken by the co-editors of this issue, aiming at the best possible quality of each paper and a consistent and well integrated combination of contributions rounding up a complex, diverse and challenging field of research, reflection and contesting views. We also asked one of the keynote speakers, Keith Halfacree, to add his view on the changing rural world and its representations as a global point of departure for our discussion and finish this special issue with three book reviews on topics related to the tourist experience and corresponding challenges to rural territories.

As far as the full articles of this special issue are concerned, a thematic division is possible with a focus on: a) the context of rural tourism development, from the perspective of the rural areas' transformations, its main activities and resources, as well as their communities' and stakeholders' strategies and initiatives to find alternative and complementary roads of development; b) the market-based perspective, understanding rural tourists' motivations and new opportunities suggested by experience marketing, particularly in the context of co-creation, sensorial marketing and post-modern consumption patterns and trends.

An understanding of the two perspectives and their matching should be paramount for developing new, competitive and sustainable development strategies for rural territories and communities, integrating rural tourism experiences that would benefit all stakeholders involved.

As a starting point of our reflections, we must recognize that rural areas across the world have undergone significant changes during the last decades, especially the more remote ones and particularly as a consequence of the changes observed in agriculture. Many rural areas have lost their long-lasting identification (in territorial and in social terms) with agriculture in the process or, at the very least, the previously characteristic relationships and articulations between agriculture and rural societies and economies have substantially changed. Many of these changes have given rise to a "consumable rural", as pointed out as well by Halfacree in his paper in this special issue. The rural space, now open for all sorts of consumptions, is increasingly represented as an idyllic place in which foreigners and inhabitants have an opportunity to interact and to create a number of shared and integrated experiences based on the local traditions and resources. As again Halfacree explains, in consequence of these changes, rural leisure users can become a relevant part of rural

territories' history and reconfiguration processes, instead of being reduced to the role of (as until now it seemed to be the case) *outsiders*.

In fact, for some decades now following the agriculture crisis, academic and political discourses on the rural have emphasized the contribution of tourism to promote local development in rural communities. But usually the point of view is merely based on the debates around the economic impacts of tourism and the way they affect residents' views on tourism activities and tourists. A more recent debate is focused on the relevance of integrating and involving all the stakeholders in the co-creation of tourism experiences and in the promotion of sustainable local development, using local, both material and symbolic, resources. Taylor, Daye, Kneafsey and Barrett offer, in their paper on this issue, a perspective on the ways in which local inhabitants of the Maroon enclave of Charles Town and of the German district of Seaford Town, in Jamaica, are developing intangible and tangible cultural tourism products based on their cultural roots, exemplifying therefore the active involvement of locals in the creation of rewarding tourism experiences and emphasizing the major role of cultural resources in the production of sustainable places.

In the same sense, but focusing on local agricultural resources and products – namely in the context of wine production – Marques and Santos provide in their paper a good example of the designing of tourist routes (in the case, wine routes) yielding local development. The case of Vale dos Vinhedos, in Brasil, analyzed by the authors, shows the relevance of creating synergies between different actors and activities around the wine production process. These synergies may contribute not only to provide unique visiting experiences for the tourists but, and perhaps more importantly, to improve local economy and to reinforce local identity, therefore promoting sustainable local development in the regional and local contexts.

The paper presented by Horan, Goulding and Tozzi provides, as well, some reflections on the role of material and immaterial local resources as local communities' major tourist attractions, taking as case studies two small settlements in the Siena Province, Italy and two small settlements in Victoria, Australia. Despite of diverse dynamics and resources, all the cases seem to illustrate the relevance of using local economic, social and environmental attributes and features in the development of rather distinct tourism products. The authors argue that in each of the four settlements vibrant and successful industries were created leveraged on each area's resources and assets which, combined with other characteristics

of the territories, have created a 'major draw card for tourists', to use the authors' own expression.

The relevance of combining activities, together with the need to create synergies and networks among the diverse stakeholders, following the current multifunctional conception (essentially from an institutional point of view) and character (essentially from a territorial perspective), of rural territories, is nowadays increasingly recognized and well expressed in the different functions specifically agricultural businesses are assuming in diverse rural contexts. Wojciechowska debates, in her paper, the experience of agritourism (a common materialization of the multifunctional character of agriculture and of rural contexts) in Poland, although the Polish agritourism industry is marked by specific characteristics, related to the recent history of the country as well as to the particularities of its development. The author shows that the agritourism phenomenon in Poland resulted, in a first stage, mainly from exogenous factors and processes, while nowadays the relevance of the linkages with local resources and identities is gradually being recognized and implemented aiming at sustainable development of rural communities and at the creation of rewarding experiences for all involved.

Also Klein and Souza present a study on the complementarity of tourism with agriculture, focusing on the importance of – until now scarcely studied – pedagogical farms, in south Brasil. The liaisons between agriculture, tourism and education contribute both to the development of learning skills of young children and to the valorization of local knowledge and know-how, therefore enhancing the local farmers' and other rural residents' self-esteem, pride and identity. Pedagogical rural tourism is based on a holistic perspective which encompasses social and economic complementarity and diversification as well as the valorization of local cultural and natural heritage. In the same sense, the multifunctional character of agriculture and rural areas may be strengthened.

As for the market-based perspective, the study presented by Kastenholtz and Santos shows that the demand of mainly Brazilian rural tourists, as perceived by owners of rural, mainly agro-tourist, accommodation units in Rio Grande do Sul (a Southern state of Brazil, where rural tourism is relatively more developed), reveal a pattern of mostly short-break, domestic family visits motivated by a general search of escape from the busy and stressful city life, in search of a kind of *rural idyll*, also found in many other studies, but showing an increasing trend towards more diversified and active holidays, in a longitudinal perspective, where rural accommodation owners

have learnt to cater with particular, not only rural asset-based (such as swimming pools), offerings to specific and diversified market needs through diverse and more involving experiences.

Agapito stresses the relevance of the sensorial dimension of these rural tourism experiences, as clearly identified in the tourism literature and particularly applicable to the stimulus-rich rural destination context, where nature elements, particular manifestations of (material and immaterial) culture, gastronomy and the social living context provide many resources for designing and communicating unique sensation-rich experience opportunities, which may increase the destination's appeal, while also permitting more involving, satisfactory and memorable experiences, eventually leading to destination loyalty.

Involving and memorable experiences should also result from co-creative learning opportunities, based on unique place resources, desired by post-modern tourists, as Gomes suggests in her article. Also intangible unique place resources may play an important role, as is analyzed in an exploratory approach for two archeological sites in Portugal (the Coa Valley Archeological Park and the Aljubarrota Battle Camp), where apparently stakeholders still consider material heritage as most relevant and where distinct views on heritage usage in the tourism context are observable. The author proposes a heritage valuation model which responds to the challenge of Integrated Rural Tourism "*to mobilise and empower ... stakeholders (through integration, communication and free information flow) in order to create valuable resources (enactment), which may positively affect rural community lives, as well as contribute to wealth creation through the development of more appealing tourist products.*"

The topic of rescue archeology heritage valuation was also explored by Dias-Sardinha, Ross and Loureiro for the Alqueva dam case. Destination stakeholders reveal a limited understanding of the potential of archeological heritage as an ingredient of innovative tourism products, although some admit the possibility of developing archeology-based complementary tourism offerings, providing educational and eventually aesthetic experiences and presenting a potential for differentiating the destination. According to the authors, "*the development of tourism products and experiences based on archaeological knowledge should provide an experience of personal transformation by means of learning and/or stimulation of the senses of tourists.*" This would help strategically manage the Alqueva tourism destination "*in light of the new trends of creative tourism and experience economy*" and may thus contribute to make a better use of endogenous resources, some of which are intangible,

need to be “rescued” or interpreted and enacted in a way making their value and meaning recognizable to both tourists and local stakeholders, including local communities.

Co-creation of rural-cultural tourist experiences is also the topic of the paper presented by Carvalho, Lima and Kastenholz reveals, in a specific village context (Janeiro de Cima) in the interior of the Portuguese central region. The authors show that there is scope for the development of co-creative cultural tourist experiences, based on the existing, material and immaterial, endogenous resources. Based on interview data from diverse stakeholders involved (local economic and development agents, residents and visitors), the large potential of presenting opportunities for new, appealing and engaging tourism experiences becomes clear, where local residents may play a role as “cultural brokers” between the newcomer and the community culture and where local resources and traditions may be better set into value, possibly enhancing not only the quality of the tourist experience, but also the sense of local identity and pride as well as the preservation of traditional and creation of new (or renewed) economic activities, if put into practice in a carefully designed, integrative and participatory way.

As previously mentioned, this special issue also includes three book reviews on topics related to the rural tourism experience and corresponding challenges to rural territories. The first book, analyzed by Dora Agapito, integrates a set of contributions on the general problematic of the “tourist experience”, its nature, determinants, analysis and implications for destination planning and management (Sharpley, R., & Stone, P. (Eds.) (2011). *Tourist experience: Contemporary perspectives*. Oxon, UK: Routledge). This book appears to be particularly appropriate as a background reading for a thorough understanding of what is at stake when analyzing tourist experiences, even though in this book with a focus on the tourist.

The second book, reviewed by Gunjan Saxena, presents a set of contributions revealing the link between agriculture, food and rural tourism (Sidali, K. L., Spiller, A. and Schulze, B. (2011) *Food, Agriculture and Tourism: Linking Local Gastronomy and Rural Tourism: Interdisciplinary Perspectives*, Springer). It shows, through several contributions and case-study examples how these central, traditional resources in rural territories may be linked to the tourist experience in these areas.

Last, but not least, the third book, reviewed by Arthur Christóvão, is written in Portuguese and presents the results of the above-mentioned 3 years research project undertaken in three Portuguese villages (Kastenholz, E., Eusébio, C., Figueiredo,

E., Carneiro, MJ e J.Lima (Coordinators), 2014, *Reinventar o turismo rural em Portugal – cocriação de experiências turísticas sustentáveis*, Aveiro: UA Editora (ISBN: 978-972-789-395-9). This book tries to present an integrated approach on the rural tourism experience, looking at it from the perspective of local actors, communities and visitors alike, as well as taking into account local resources and their usage in a sustainability yielding rural tourism development in the villages under study.

We understand that the selection of these contributions sheds some light on and raises relevant questions regarding very complex development and sustainability concerns focusing on rural tourism experiences as a tool for rural development. No final answer is given to the question if and in how far rural tourism actually leads to sustainable development nor do we present any guideline or recipe for achieving success or sustainability in the process of rural tourism development. We actually believe, also based on the present cases and so many more we know from the literature, that there are far too many variables at stake to make any such prevision or give any generally applicable indications of how to act to achieve success in sustainable rural tourism development. Still, some cases of success and important critical factors possibly enhancing it, as well as challenges possibly jeopardizing it, are discussed, by different authors referring to distinct contexts and presenting distinct perspectives of the “rural tourism experience” or better “experiences”. We hope that these contributions may be a reference or inspiration to other researchers interested in these complex topics of rural tourism and sustainable rural development, helping to identify relevant concepts, dimensions and variables of interest, as well as interesting methods of analysis and examples of action.

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A critical response to the (non-)place of rural leisure users within the counterurban imagination

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Abstract: The concept of ‘counterurbanisation’ is now widely recognised within several branches of academia. Over the last four decades it has come to represent the net migration of people to more rural areas, notably although not exclusively across many countries within the Global North. It focuses on ‘permanent’ relocation, having separated itself within scholarship from more ‘temporary’ movements to rural areas, not least those undertaken for leisure purposes. This paper addresses this intellectual positioning of counterurbanisation and its exclusion of leisure users, arguing that, in some circumstances, it may now be unhelpful. In particular, recent discussions around the idea that we now live in an era of mobilities can lead to questioning both the idea of ‘permanent’ migration and its separation and implicit prioritisation over other forms of mobility. This leads to the paper advocating reconciliation between rural in-migrants and rural leisure users within a much broader counterurban imagination.

Key Words: counterurbanisation, rural leisure, mobilities, classification, rural populations.

A resposta da crítica ao (não) lugar dos usuários de lazer rurais no contexto do conceito ‘counterurban’

Resumo: O conceito de ‘counterurbanisation’ é hoje amplamente reconhecido dentro de vários ramos da academia. Ao longo das últimas quatro décadas tem vindo a representar essencialmente a imigração de pessoas para áreas rurais, embora não em exclusivo, mormente em muitos países do Norte. O conceito centra-se na ‘permanente’ deslocalização, tendo-se distinguido dos estudos de movimentos mais ‘temporários’ para as áreas rurais, não tanto aqueles realizados para fins de lazer. Este artigo aborda, assim, o posicionamento de ‘counterurbanisation’ e, em particular, os recentes debates em torno da ideia de que agora vivemos numa era de mobilidades conduzindo ao questionamento do conceito de migração ‘permanente’ e da sua separação e priorização implícita relativamente a outras formas de mobilidade. Deste modo, somos conduzidos à questão da reconciliação entre (in)migrantes para o espaço rural e os usuários de lazer rurais adentro de uma idealização dita ‘counterurban’ muito mais ampla.

Palabras-chave: counterurbanisation, lazer rural, mobilidades, classificação, as populações rurais

1. Introduction: consuming the dynamic European countryside

It has now become something of a truism that the European countryside should be recognized as a highly dynamic and rapidly changing environment. This is apparent both from the perspective of land use and ecology and in terms of socio-economic and cultural issues. Change has long been a core expressive feature of the urban world – possibly one of its defining features, expressing renewal, revitalisation and renaissance – but the need to

make a similar case for the rural reflects a predominantly dualistic perspective on urban and rural. This has historically placed them as socio-spatial opposites: the urban epitomises change, the rural reproduces stasis. Oliva (2010: 284) summarises the position thus:

‘the rural world was generally considered the antithesis of urban changeability and speed. The inertia and stability of rural life... were imagined somewhere in the background to the social whirl and mobility of modern cities’.

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But, as has been said, all that has now changed; although this shift in representation may be largely confined to academia, and to rural studies in particular. Any cursory examination of how popular culture represents rural life immediately reveals it still reproducing and thriving on the old dualism! Nonetheless, returning to academia, in a background paper for a major EU-funded project on *Developing Europe's Rural Regions in the Era of Globalization*, Michael Woods (2009: 6) emphasizes how:

'the differentiated geography of rural Europe is not static, but dynamic, shifting according to patterns of social and economic restructuring and trajectories of political reform. The contemporary era of globalisation and late capitalism arguably represents a heightened period of flux.'

Besides the importance of seeing a rural aspect to globalisation, rural dynamism also comes through in models of rurality such as that of post-productivism, which engages with ongoing dimensions of rural change and can even encompass more potential dimensions (Halfacree, 2006a). All of this, in turn, feeds into, for example, the OECD (2006) calling for a 'new paradigm' for rural development policy.

This essay argues that now we have attained a much more dynamic sense of rurality and a firmer recognition and acceptance of rural change, we are in a position to revisit and reflect critically on some of the intellectual devices through which appreciation of this dynamism has been achieved. This review should encompass our classificatory practices, whereby how we construct objects of academic analysis itself comes under reflexive scrutiny (Bourdieu, 1998; Halfacree, 2001). This is because the necessary process of categorisation nonetheless typically involves what Law and Whittaker (1988: 178-9) termed 'discrimination', whereby:

'new classes of objects are brought into being, objects whose boundaries and properties are clearer than those they have replaced, objects that may more easily be interrelated with one another.'

How consistently discrete or robust these 'new objects' actually are (Sayer, 1989) is a question to be continuously asked if we are ultimately to develop a fuller understanding of the entangled, messy, confused and unstable totality of the social world of which we are all part (Ingold, 2011).

Specifically for the present essay, critical scrutiny can be given to how we academics have predominantly come to frame rural leisure users, consuming the countryside for various pleasurable purposes,

relative to people undertaking residential migration towards more rural locations. This scrutiny needs to be set within a heightened appreciation of the dynamics of rural populations (Milbourne, 2007), which can be seen to blur, confuse and even transcend seemingly established categories. Awareness of these dynamics within the noted increasing consumption role and potential of rural places provided a core dimension to the overall appreciation of rural change.

The argument of this essay is, in short, that one consequence of seeing rural localities as having been and continuing to be transformed through economic restructuring (globalisation) and social re-composition (Cloke and Goodwin, 1992) is that two previously closely aligned sets of rural consumption practices – leisure users and in-migrants – have become largely separated within research practice and imagination. On the one hand, a key aspect of rural *economic* restructuring has been identified as leisure- and tourism-related commodification. On the other hand, rural *social* re-composition has been especially associated with in-migration. Whilst this separation is sometimes informative, at other times the divergence it has promoted within scholarship may be detrimental to understanding changing rural places.

The rest of the essay is structured as follows. First, it turns briefly to the relative place of rural leisure users and counterurbanisers within three British Rural Geography texts, from the 1970s, 1980s and 2000s, respectively. This traces divergence between work on leisure users and in-migrants but also hints at reconciliation. Second, the essay presents a précis of academic understanding of in-migration – the 'counterurbanisation story' (Champion, 1998) – whose seeming finale, namely that it largely expresses bourgeois lifestyle migration, becomes the subject of critical query in the third section. This challenges the emphasis given in the counterurbanisation literature – and in migration scholarship generally (Barcus and Halfacree, forthcoming) – to the 'permanence' of migration. Fourth, a brief digression into the 'era of mobilities' reiterates this querying of permanence, which leads to the concluding section's call to rethink academia's counterurban imagination. Specifically, such a rethink allows – in certain circumstances at least – rural leisure users to become a crucial element within an expanded counterurban imagination.

2. Rural leisure users and counterurbanisers within Rural Geography

Early in his career, Paul Cloke (1980: 182) hailed Hugh Clout's (1972) *Rural Geography*:

an *Introductory Survey* as 'one of the first rural geographical texts to remove itself from the main tenor of agricultural economics' and establish 'a legitimized subdiscipline'. As such, it is a good place to start reviewing the relative academic position and prominence of rural leisure users and in-migrants, henceforth 'counterurbanisers', two groups which had started to be noted in scholarship.

Clout's book associated both groups of rural consumers together. Leisure users and the 'adventitious population' - who lived in rural areas by choice but did not work there (Stamp, 1949) - were united as representing urban encroachment into the countryside. They expressed an 'urbanization of the countryside [that] can be produced by a variety of mechanisms and take on a number of nuances' (Clout, 1972: 43), a combined 'movement of city people' (Clout, 1972: 44), whether for living or recreation. Urban origin and mobility, in short, united them.

Subsequently, within the newly vibrant rural geography sub-discipline (Cloke, 1980), the two groups of 'urban' consumers soon attracted considerable research attention. Reflecting this, by David Phillips's and Allan Williams's (1984) *Rural Britain: a Social Geography*, little more than a decade after Clout, they had acquired both heightened and separate prominence. First, 'counter-urbanization' informed strongly the 'Population and social change chapter', whilst five chapters further on a whole chapter was allotted to 'Recreation and leisure'. By 1984, the pattern and content of this separate development of scholarship within these two areas was also already apparent. Numbers, classification, motivations and socio-economic and cultural characteristics tended to dominate work on counterurbanisation, whilst rural leisure and tourism research adopted a more applied, planning and economic emphasis. This distinction, although not developed further here, immediately suggests how dialogue between the two bodies of work might be most fruitful.

Finally, two decades further on, Michael Woods's (2005) *Rural Geography* again had the two groups separated by several chapters. 'Counterurbanization' dominated the 'Social and demographic change' chapter, whilst the enhanced consumption role of the rural was expressed strongly in the 'Selling the countryside' chapter where, for example, even farming was now seen as being shaped by the demands and expectations of the urban consumer. Markedly different literatures, concepts and priorities were sharply represented within the two contributions. Nonetheless, it is also prescient for this essay to note that the social and demographic change chapter contained near the end a short section on second homes, presented

as a key expression of rural gentrification. After years of separate development, therefore, is it the case that counterurbanisation scholars are beginning to (re-)engage with rural leisure users? If so, how are these links being made and how might a rapprochement develop further for mutual benefit? The present essay begins to address these questions, approaching them from the 'counterurbanisation' perspective the author has most experience with (e.g. Halfacree, 2008, 2009). This requires first telling, after Champion (1998), the 'story' of counterurbanisation.

3. The counterurbanisation story

Until at least the 1970s, the overwhelmingly dominant image of rural populations throughout Europe in the 20th century was one of decline (e.g. Johnston, 1966); a demographic loss captured evocatively in the phrase the 'drift from the land'. Indeed, it is an image that persists today and, of course, still accurately depicts the overall demographic experience of many rural areas across Europe.

Nonetheless, drift from the land, stimulated in particular by agricultural decline, is certainly no longer the only rural demographic game in town. Particularly stimulated by evidence from US census data from the late 1960s and early 1970s (e.g. Beale, 1975), demographers and population geographers began to notice that, in some parts of some rural areas of some countries in Europe, populations were increasing. This growth was not substantially due to 'natural increase' - births over deaths - but was coming about through net population in-migration. Again pioneered by US researchers, commentators went on to speak of a 'population turnaround' (Brown and Wardwell, 1980), even a 'rural renaissance' (Morrison and Wheeler, 1976), with the long-dominant trend of net migration towards the cities being checked or even replaced. What replaced it was labelled counterurbanisation (with a 'z' in the US), its considerable significance heralding '[a] turning point... in the American urban experience. Counterurbanization has replaced urbanization as the dominant force shaping the nation's settlement patterns' (Berry, 1976: 17).

It was soon recognized that what was happening was not simply metropolitan expansion but an expression of people 'voting with their feet' and choosing to live within more rural residential environments. A complex pattern of counterurbanisation soon emerged, covering much of the Global North (e.g. Champion, 1989; Boyle and Halfacree, 1998). In general, it could be expressed via a negative linear correlation between population growth

and settlement size (Fielding, 1982). However, as researchers such as Tony Fielding and Tony Champion consistently made clear, counterurbanisation creates a population mosaic, not a monochrome painting, as it was also seen to express at least three key types of selectivity. First, it was socially selective, biased in favour of: higher social classes; people in self-employment; middle aged and retired adults; non return migrants; owners of houses; households of two or more adults. Second, it was historically selective, not just in having developed as a numerically significant phenomenon from the middle 20th Century but also fluctuating with the state of the economy, being strongest in economically buoyant times. Third, counterurbanisation was and remains highly geographically uneven, at both national scales and intra-nationally. In terms of the latter, it tends to be strongest in the more accessible countryside, with many isolated, remote rural areas still experiencing net out-migration.

In telling the 'counterurbanisation story' 16 years ago, Champion (1998) recognised a tale then entering its third decade. Indeed, it remains a key research area within both Population and Rural Geography and further afield. Much effort has been expended trying to explain it. Early understandings moved from seeing it as some kind of 'natural' phenomenon of human evolution to recognising how it was enabled by technological developments – from modern private transportation to labour saving devices in the home – that allowed people to live often many kilometres from their workplace. Culture soon came into the equation, too, with Berry's (1976: 24) initial assertion that counterurbanisation was the 'reassertion of fundamental predispositions of the American culture... antithetical to urban concentration' becoming carefully and critically nuanced. Elsewhere, though also with a strong cultural dimension, counterurbanisation received a 'wholly darker, more hard-edged, materialistic and realistic explanation' (Fielding, 1998: 42) that linked its emergence and growth with dynamics of the capitalist class structure, notably in terms of rural areas increasingly presenting economic opportunities (the rise of rural consumption noted earlier) and providing a geographical *habitus* (Bourdieu, 1984) for 'service class' identity.

Within all of this debate on the causes of counterurbanisation, a key role has been given – not least within the present author's own work – to potential and actual migrants' place images (Shields, 1991), imaginative geographies (Gregory, 1994), or spatial representations (Halfacree, 1993) of rural (and urban) places. Indeed, qualifying any emphasis on the role of practical living, Dirksmeier (2008: 160, my emphases) could even assert that '[t]he structure and situation of a rural area... are of

little relevance to the newcomers' motives. It is the *conception* of an idealized rural lifestyle which is crucial in determining the actions and attitudes of people at the time of their arrival'. These conceptions of the counterurbanisers, as the quote suggests, predominantly represent rural places as residentially quasi-idyllic, in contrast to the largely anti-idyllic city (Halfacree, 1995).

From all of this counterurbanisation scholarship, one might conclude, as this author hypothesised a few years ago (Halfacree, 2008), that scholars may see little more very original to investigate or insightful to say about counterurbanisation. Indeed, within the last few years counterurbanisation has increasingly become somewhat subsumed within the wider suite of so-called lifestyle migrations and their diverse attempts to 'escape to the good life' (Benson and O'Reilly, 2009). Academically, in other words, one might suggest the counterurbanisation story has largely run its course. Arguing now that this is actually far from the case (Halfacree, 2008), the present essay will eventually return, in fact, to rural leisure users...

4. Counterurbanisation beyond lifestyle migration

Any seeming consensus of counterurbanisation being reducible to a form of bourgeois lifestyle migration (e.g. Murdoch, 2006: 177) can be challenged through bringing to the fore a range of 'other' counterurbanisations (e.g. Halfacree, 2001, 2008, 2011). Three particular strands can be identified. Whilst not as prevalent as the bourgeois lifestyle category, all reveal counterurbanisation *in its totality* to be a more complex, multi-stranded phenomenon or set of phenomena. Moreover, whilst the origin of all these moves may not be 'urban', their movement into the rural makes them counter-urban from a rural perspective (Cloeke, 1985).

First, there are 'back-to-the-land' migrants (Halfacree, 2006b). These are broadly countercultural people who relocate to a rural location in order to combine agricultural smallholding with degree of self-sufficiency. Epitomised by proponents of what Fairlie (2009) has termed 'low impact development', back-to-the-land lives centre very much around a practical ethics that centres on relationships with humans and non-humans within an overall land-working network. Clearly, there is a degree of overlap with bourgeois lifestyle counterurbanisers, not least as going back-to-the-land still represents lifestyle migration, but it is instructive sometimes to distinguish the group (Halfacree, 2001).

Second, whilst the counterurbanisation literature has been dominated by what are known as internal

or intra-national moves, engagement with broader lifestyle migration scholarship has demonstrated that counterurbanisation has some distinctly international strands. For example, there is 'heliotropic' (King, 2002) migration, not least of retired people, to sunnier parts of Europe and beyond. More clearly rural focused, however, are a number of detailed studies of Britons who have moved to rural France, for example. Pioneered by Buller and Hoggart (1994), this work now extends to detailed case studies by Benson (2011), Neal (2013) and others. Of course, these studies still position counterurbanisation as lifestyle migration, and also fit the dominant model in terms of social class, motivations, and so on. More complex in this respect is another form of international counterurban migration that involves 'returning' to a rural location left years before. Such expressions of return migration, such as Irish returning to rural Ireland from London or the US, 'complicate... dualistic categories of migrant and local' (Ní Laoire, 2007: 343) and are less clearly lifestyle migrations in any amenity-focused sense.

Third, there are expressions of international labour migration that can take a strongly counterurban character. These flows return attention to the value of always relating counterurbanisation to the changing spatial and social divisions of labour, thereby reviving 'economic' explanations (Fielding, 1998). For example, there is migration to rural areas linked to continued high labour demand from some forms of agriculture. These include flows of North Africans to Spain and Eastern Europeans to the UK (e.g. Woods and Watkins, 2008). Such migration is certainly *not* lifestyle migration (as usually understood) and has little space for 'idyllic' rural representations, thus fundamentally challenging any bourgeois lifestyle consensus.

One objection to bringing the latter group into the counterurbanisation universe would be to point out that they are generally 'temporary migrants', coming for the work and then returning to their origin countries. However, this essay refutes such an objection from at least two directions. First, how can one be certain that such migrants will definitely be 'temporary'? Even with an intention to return – and even with state policies insisting on this, such as providing temporary work visas only – some always stay, whether legally sanctioned or not. Second, even if presence is temporary – perhaps for just a summer – the impacts of international migrants on a rural place can be significant. For example, they will contribute to the local economy, they may have children requiring schooling, and they will, through their labour, support local businesses. Furthermore, even if *individuals* may be temporary residents of a rural place, institutionalisation of the labour migration system makes the presence

of 'equivalent' people much more permanent. This gives a whole new sense of an 'adventitious' rural population – one which is 'not inherent but added extrinsically' (Free Online Dictionary, 2014) – than that recognized by Stamp (1949).

What has been argued in this section, therefore, is that no sooner has the counterurban 'untamed becomes domesticated' (Billig, 1985: 86) conceptually into a story that revolves around bourgeois lifestyles than this contented picture is found wanting. New strands and forces come into the picture, a key consequence of which is to destabilise the permanent-binary dualism that features strongly within migration scholarship (Barcus and Halfacree, forthcoming; King, 2002), including that discussing counterurbanisation. It is from this vantage point that the essay will shortly go on to argue for the 'return' of rural leisure users to the embrace of the broad counterurban family. However, the vantage point will now be reinforced via a short digression into the 'era of mobilities' (Halfacree, 2012).

5. The era of mobilities

Over a century and a half ago, Marx and Engels (1848) famously declared how 'all that is solid melts into air'. Whilst the dynamism of capitalism being referred to has remained one of its defining features, such a sense of mobility and dynamism has recently been accorded more general significance, both metaphorically and experientially. Mobility, in short, is for some a (the?) contemporary *zeitgeist*: we live in an 'age of migration' (Castles *et al.*, 2013: *cf.* Bauman, 2000; Cresswell, 2006; Urry, 2007).

To get to grips with this mobile age, understandings based on 'movement, mobility and contingent ordering' must replace those emphasising 'stasis, structure and social order' (Urry, 2000: 18). Such new understandings challenge, in particular, a core societal assumption of 'sedentarism' (Cresswell, 2006). This assumption, arguably reflected in the ideas of philosophers such as Martin Heidegger, for example, proposes that being still, bounded and 'authentic' through 'being-in-place' is a core foundational feature of (proper) human life.

Acknowledging within any proposed era of mobilities the increased quantitative and qualitative significance of migration within everyday life, while necessary, is not enough. Migration's own sedentary underpinnings, presenting residential relocation as inherently both unsettling and abnormal, must be challenged (Halfacree, 2012). One way to do this is to present migration as part of the more general mobile rhythms of lives led (Barcus and Halfacree, forthcoming). Perspectives must shift from regarding residential migration as an essentially unique or distinctive form of movement to locating it within

a broad spectrum of mobility (Pooley *et al.*, 2005) that both expresses and shapes everyday life. Within this spectrum, mundane, everyday mobilities, for example, can be seen having numerous significant impacts upon the human condition.

Conceptual re-imagining of the place of migration vis-à-vis both its societal significance and its relations to other forms of mobility has significant implications for the scope of Population Geography's interest in people 'on the move' (Barcus and Halfacree, forthcoming). In particular, it suggests that we should not automatically bracket out 'permanent' migration for specific circumscribed analysis. Instead, acknowledging 'the never-straightforward boundary between migration and mobility' (King, 2002: 90), we should recognize migration's connections and parallels with other forms of mobility; independent not separate spheres (Sheller and Urry, 2006). Reiterating, we must attend to the full spectrum of mobilities (Pooley *et al.*, 2005) if the relative place of migration within lives lived across space is to be adequately understood and appreciated.

A mobilities sensitivity raises many questions within many areas of scholarship. One such area concerns what is meant by 'home', also a central topic within migration research. Conventionally, *the* home has been presented as an essentially sedentarist singular, fixed and rooted place. Yet, very simply, does home have to comprise one place? Think how slippery the concept is in terms of how it may be defined spatially – house, village, region, country, and so on (Blunt and Dowling, 2006). Consequently, scholars promoting ideas such as transnationalism (McEwan, 2004) challenge simple and singular ideas of home. Generally, one can recognise homes as *becoming*, routed through and emergent from people's everyday connections with places of diverse 'everyday texture' (Conradson and Latham, 2005: 228). Within such an imaginary, whilst 'work, home and play are separated in time and place, ...meanings and identity are structured around not one but several places' (McIntyre *et al.*, 2006: 314). Rural second home consumers can exemplify this situation well (Halfacree, 2011, 2012).

A predominant theme within academic work on rural second home consumption is, understandably, the mapping of patterns, trends and practices of leisure usage (e.g. Hall and Müller, 2004). Yet, scholarship has proceeded also to present second homes as providing an 'escape' or 'vacation' from the often challenging demands of 'modern' lifestyles (e.g. Kaltenborn, 1998) and even to regard the second home as becoming an integral part of everyday dwelling (e.g. Overvåg, 2009; Gallent, 2007). In other words, what might be seen as an ephemeral expression of leisure consumption becomes entwined within a more mobile conception of home.

Leisure practices – as, of course, its leading scholars have long argued – take centre stage within the practices of everyday life. This realisation provides the final piece of the jigsaw that now allows this essay to propose leisure users being 'reconciled' with more 'permanent' residential migrants within a renewed counterurban imagination.

6. Conclusion: rural leisure users within the counterurban imagination

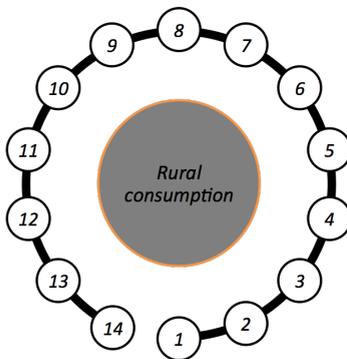
This essay has argued several points within its account of the development of counterurbanisation and counterurbanisation scholarship. First, whilst early to mid-20th Century British rural scholarship tended to associate both rural leisure users and more permanent in-migrants together, as expressions of an adventitious rural 'population', these two groups subsequently became increasingly separated. Whilst both expressed the growing importance of rural consumption, one can argue that it became necessary to separate and discriminate them in order to appreciate their significance. This was especially the case for the emergence of large-scale migrations to rural locations, which became known as counterurbanisation. Briefly tracing this demographic shift revealed that, second, by the end of the 20th Century it had largely been reduced to an important, interesting but quite well understood expression of lifestyle migration. Third, the essay argued that this domesticated and discriminated representation of 'counterurbanisation' has increasingly been found wanting, at least in qualitative terms of the range of people expressing a counterurban shift. Within this critique, crucially, the confidence we can have in defining counterurbanisation as a 'permanent' relocation has been queried. This may have enabled it to be discriminated from 'temporary' leisure users but the validity of this hard divide is problematic. Fourth, this discrimination is challenged further by the mobilities paradigm and its implications, for example, for sedentarist representations of home. Consequently, it can be argued that forms of leisure consumption, such as rural second homes, can present rural environments as home places, even when no 'permanent' relocation has taken place.

The consequence of this narrative is that it may now be time to consider rural leisure users in general as important components *within* rather than external to the counterurban imagination, as Woods (2005) began to imply. Rural leisure users can become part of a counterurbanisation story that has been told to date largely without them. The full implication of the mobilities turn is that 'temporary' residence alone is inadequate to exclude such rural leisure users. This new imaginary firmly represents counterurbanisation

as being more than just a permanent residential shift 'from urban A to rural B'. Leisure users are reconciled with residential migrants, one again through their 'urban' origins and their mobilities.

Finally, going further still, rural leisure users can go on to take their place together with more conventionally understood counterurbanisers and other rural residents within Figure 1's diagrammatic depiction of the contemporary rural population (simplified from Halfacree, 2012). This figure identifies some 14 'slices' of rural place consumer, the slices imperfectly and unstably determined according to what can be called 'place commitment'. Roughly speaking, this commitment can be defined by the proportion of time (and consequent effort?) spent 'within' the identified rural environment. It draws inspiration from Gallent's (2007: 99) proposal of an immersed to inhabited hierarchy, which ranges 'from those who thoroughly dwell – and become (or *are*) immersed within a place – to those who merely "inhabit" in a more detached sense'. It centres the (em)place(ment) issue within a mobile world: stability-within-movement as Sheller and Urry (2006: 214) express it. Leisure users, within this imaginary, have at least as much stake in the 21st Century dynamic rural as many more 'permanent' rural residents. The adventitious, in all their diversity, have thus truly come of age...

Figure 1. Consumers of Rural Places by 'Place Commitment'



In-transit visitors
 Occasional visitors (non-residential)
 Occasional visitors (residential)
 Regular visitors (non-residential)
 Regular visitors (residential)
 Second-home owners (irregular users)
 Second-home owners (regular users)
 Dual location households
 Long-distance workers (rarely at home)
 Long-distance commuters (weekly)

Long-distance commuters (daily)
 Short-distance commuters (urban)
 Short-distance commuters (rural)
 Non-commuters (*in-situ*)

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Grupos de trabajo

Área I. Dirección y gestión de empresas de servicios turísticos

Área II. Distribución turística y transportes

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Exploring cultural connectedness in the sustainability of rural community tourism development in Jamaica

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Abstract: The focus of research into the sustainability of rural community tourism in Jamaica often gravitates toward the economic, environmental, political and management components. This ethnographic study explores how two distinctive groups - the Charles Town Maroons, descendants of slavery resistance fighters and the Seaford Town Germans, descendants of indentured labourers from Germany - are exploiting their culture by way of rural community tourism to fashion new livelihood streams. The discussion offers unique insights into how the concept of horizontal and vertical cultural connectedness can add to an understanding of how locals are drawing on their past to generate intangible and tangible cultural tourism products. It further highlights the meanings culture holds for rural inhabitants in relation to sense of place, identity and the development of sustainable rural community tourism.

Key Words: Culture, connectedness, Germans, Maroons, Jamaica, sustainability, tourism.

Exploración de conexión cultural en la sostenibilidad del desarrollo del turismo rural comunitario en Jamaica

Resumen: El enfoque de la investigación sobre la sostenibilidad del turismo rural comunitario en Jamaica a menudo gravita hacia los componentes económicos, ambientales, políticos y de gestión. Este estudio etnográfico explora cómo dos grupos distintivos - Charles Town Maroons, descendientes de los esclavos combatientes de la resistencia y Seaford Town Germans, descendientes de trabajadores contratados en Alemania - están explotando su cultura por medio del turismo rural comunitario a la moda nuevas fuentes de sustento. La discusión se ofrece detalles sobre cómo el concepto de horizontal y vertical conectividad cultural puede agregar a la comprensión de cómo la gente se basan en su pasado para generar tangibles e intangibles productos de turismo cultural. Se destaca la cultura significados tiene para los habitantes rurales en relación con el sentido del lugar, la identidad y el desarrollo del turismo rural comunitario sostenible.

Palabras Clave: Cultura, conectividad, alemanes, cimarrones, Jamaica, sostenibilidad, turismo.

1. Introduction

As a series of actions and practices, tourism centres on the heuristic behaviour of people and understanding and communication of their mea-

nings by way of 'symbols and embodied through objects' (Robinson and Smith 2006: 1). At the same time, culture can be seen as 'substituting itself to life as a constructing power and transformational process' (Robinson and Smith 2006: 1). In

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other words, even though culture constructs and reconstructs, it is imbued with normalcy and is interwoven into the very fabric of everyday life. Tourism is an illustration of these processes and shares historical references and capabilities for constructing and re-constructing culture. 'Tourism is simply 'cultural', with its structures, practices and events very much an extension of the normative cultural framing from which it emerges' (Robinson and Smith 2006: 1). Tourists' inclination for culture products is thus intertwined with a reach for the past, to connect to historical references in either intangible or tangible forms.

In a similar way, ideas of cultural belonging, at both conscious and unconscious levels, encompass desires, which 'satisfy a deep psychological need for a sense of historical continuity, security and identity' (Pinderhughes 1989: 10). It 'refers to a sense of connectedness with the world that can be seen as both vertical and horizontal, external and internal' (Pinderhughes 1989: 10). While these linkages resonate with ideas of socio-psychological and emotional wellbeing, they are also interrelated with the generation and communication of ideas that influence the construction and re-construction of intangible and tangible tourism culture products. This not only has implications for emic perspectives in sustainable rural community tourism research, but also for etic considerations, in that a major reason why people go on holiday, as McCabe (2009) argues, relates to satisfying their socio-psychological wellbeing needs through consumption of tourism culture offerings.

The aim of this paper, therefore, is to explore notions of cultural connectedness in the sustainable development of rural communities in Jamaica by analysing the influence of horizontal and vertical linkages on local inhabitants' way of life and their production of intangible and tangible culture inventions. The examination draws on empirical data from ethnographic fieldwork conducted in a community of Maroon descendants in Charles Town in the eastern parish of Portland and a community of German descendants in Seaford Town in the western parish of Westmoreland. The paper is based on doctoral research evaluating the role of culture and tourism in the sustainable development of rural communities in Jamaica. The goal of the research was an examination of the meanings culture holds for rural inhabitants in relation to sense of place, identity and community development in Jamaica and the extent to which local people capitalise on their intangible and tangible culture in pursuit of sustainable rural community tourism in Jamaica. The discussion begins with a definitional outline of culture. This is followed by discussion of cultural connectedness focussing on how linkages to the

past, which African Jamaicans relied on as a source of resistance and empowerment, are now being utilised in the construction and re-construction of intangible and tangible culture products for tourists. Selected findings of the study are reported.

2. Culture meanings

Culture is a socially constructed continually evolving concept that is forged through the outcome and product of human interaction (Cohen, 1988: 196). In this study, culture, which is said to enjoy a symbiotic relationship with tourism, can be seen as the meta-variable underpinning the key topics and themes. As a series of actions and practices, tourism centres on the heuristic behaviour of people and understanding and communication of their meanings by way of 'symbols and embodied through objects' (Robinson and Smith, 2006: 1). Culture cannot be viewed as inimical or a veneer, 'but as substituting itself to life as a constructing power and transformational process (Robinson and Smith, 2006: 1). In other words, even though culture constructs and reconstructs, it is imbued with normalcy, is not discrete, but interwoven into the very fabric of everyday life. Tourism is an illustration of these processes and shares historical references and capabilities for constructing and re-constructing culture. 'Tourism is simply 'cultural', with its structures, practices and events very much an extension of the normative cultural framing from which it emerges' (Robinson and Smith, 2006: 1).

3. Cultural connectedness

Whether consciously or unconsciously, African descendants in Jamaica have drawn from their cultural connectedness to Africa, not only to resist European attempts to dominate them, but to sustain themselves, boost self-esteem, ensure wellbeing and growth. The inherency of their cultural connectedness thus intertwines with notions of sustainable development, which is about linkages with present circumstances and future aspirations, and extends beyond by encapsulating ideas of psychological happiness. In a similar way, heritage, the production of which increasingly appeals to tourists, (Park, 2014) can be seen to coalesce with ideas of cultural connectedness and sustainability. Even though heritage is rooted in 'historical knowledge and performance', it should not be seen as a by-product of economic change, but as 'living history incorporating social processes of both continuity and change' (Park, 2014: 2). Furthermore, it is not de rigueur physical presentation that makes heri-

tage products attractive and appealing to tourists, but the significance of the 'images, meanings and symbols that are attached to them' (Park, 2014: 2). While the idea of continuity associated with heritage accords with sustainability so too does its linkages with cultural connectedness. After all, heritage and culture are multiple constructions of the past that are continually recreated and presented for contemporary uses.

With few built structures, the majority of rural community tourism products in Jamaica are based on intangible and tangible cultural heritage. They take the form of storytelling, artefacts, images, symbols, meanings and natural phenomena, which have emerged from a setting that has been built on forced migration, disparate peoples, resistance, natural wonders and an assortment of beliefs, customs, habits and norms. Reflective of the island's representations from across the globe, they are primarily shaped by those forcibly taken from Africa to work on European-owned plantations as slaves between 1498 and 1665 (under Spanish rule) and 1670 and 1808 (under British rule) (Buckridge, 2004). Others, who came in the 19th Century from India, China, Lebanon, Syria and Germany, were indentured labourers and economic migrants seeking a better life. Although some of the migrants' stories are tinged with adversity, the narrative of African descendants is incomparable. Among the indignities they endured was 'psychological conditioning' to erase every aspect of African culture so that they would be permanently mentally imprisoned (Buckridge, 2004: 17; Beckles and Shepherd, 2004). Europeans felt that if African descendants were to maintain their own culture it would unify them into rebellion (Buckridge, 2004: 17; Beckles and Shepherd, 2004). Even though many Africans appeared to acquiesce by maintaining aspects of their culture, they were able to survive European hegemony. That the influence of Africa is still visible in Jamaica today is evidence not only of the survival of heritage, but the sustainability of holding on to facets of one's culture.

The survival tactics of African descendants were built around notions of cultural continuity even though the incommunicable nature of their captivity meant their connection to the African motherland was, largely, symbolic. 'By claiming Africa as the homeland, (African) Jamaicans gain a sense of historical continuity, of identity, of roots' (Sherlock and Bennett, 1998: xi). It was a continuity or connectedness that manifested in numerous ways. Buckridge (2004: xi) notes the African descendants were determined to continue the wearing of African attire, which allowed them to 'maintain a vital cultural link with their ancestral homeland and, in the process, to resist

the institution of slavery, which denied them basic human rights'. Furthermore, Buckridge (2004: 17) argues that the Africans in Jamaica 'nurtured certain African characteristics and transmitted them to their descendants'. These are rooted in folklore, music, language, religion, dress, herbalism, mental and spiritual healing and funeral customs. It is out of these traditions, Buckridge (2004) believes, have evolved the innovation and creativity that have shaped the intangible and tangible cultural heritage that exists in Jamaica today. These undergo continuous recreation, in various genres, and exploited for emotional and psychological wellbeing and livelihood strategies such as rural community tourism.

4. Ideological mosaic

Chevannes (1994: 33) highlights the 'idealisation of Africa' as another way in which African descendants sought to maintain their cultural connectedness with their ancestral homeland. This representation of Africa focussed on Ethiopia, because Biblical references to the country held a 'liberatory promise', which 'showed the black man in a dignified and humane light' (Chevannes, 1994: 34). For example, Psalm 68, verse 31 states, 'Ethiopia shall soon stretch out her hands unto God' (Chevannes, 1994: 34). The significance of Africa or Ethiopia as an 'ideological mosaic', Chevannes (1994: 34) argues, 'becomes a symbolic point of reference, whether as ideal home - hence denoting reparation - or as a source of identity - hence identification'.

Without much doubt, the most significant feature in the idealisation of Africa was the crowning of Ras Tafari as Emperor Haile Selassie 1 of Ethiopia in November 1930 (Chevannes, 1994). Selassie's titles, like some of the Biblical references to the 'Messiah', were, 'Kings of Kings, Lord or Lords, Conquering Lion of the Tribe of Judah, Elect of God and Light of the World' (Chevannes, 1994: 42). His ascendancy, along with the 'Back to Africa' teachings of the late Jamaican African rights campaigner, Marcus Garvey, gave impetus to the formation of the Rastafari, who view Ethiopia as 'Zion', their spiritual home (Chevannes, 1994: 33-42). The Rastafari doctrine holds that Selassie is the two-hundred-and-twenty-fifth descendant of the throne of David, which would make it the oldest sovereignty in the world, and, therefore, has direct lineage to Solomon (Bedasse, 2010). The Biblical linkages, which represents an 'Africanisation of Christianity' (Bedasse, 2010: 972), not only cemented the Rastafari cultural connectedness to Africa, but provides them with a discourse to

counter the source of European hegemony, which were based on interpretations of Bible text. The Jamaican religious practice of Pukumina, for example, embodies 'Africaness' (Chevannes, 1994: 33-42). Many of these customs that form the basis of Pukumina and Rastafari are inherited from the Maroons (Campbell, 1985), who continue to use them today. For example the Charles Town Maroons' spectacle for visitors revolves around drumming, dancing, reciting West African folklore and speaking in the Twi language.

5. Sense of connectedness

African centred ideological symbolisms suggest a need to belong, a sense of connectedness. A prevalent resistance strategy in slavery was running away (Chevannes, 1994), and as Quinn in Halfacree (2010: 257) notes, 'People's desire to escape is strongly tempered by an attempt both to reconnect with experiences from their past and to strive for a continuity that will strengthen into their futures'. Similar notions of connectedness and wellbeing are bound up with the African philosophical tradition of Ubuntu, which places emphasis of 'belonging' to the human community (Venter, 2004: 151). Sharing overtones of Buddhism, the idea of human community encompasses a 'vast, ever-expanding net of spiritual, psychological, biological and emotional relations' (Venter, 2004: 151). Even though Venter (2004: 150-156) points out the critics' line that Ubuntu is often hijacked as a 'mechanical' problem-solving tool, it is maintained that its underlying principles are built on a 'concrete manifestation of the interconnectedness of human beings'. Furthermore, Ubuntu's existentialist underpinnings recognise the need to consider the wellbeing of others and that sharing was an essential feature of interactions between people as opposed to the discreteness at the heart of western culture.

Cultural connectedness can thus be framed within the context of Berger and Luckmann's (1996: 82) contention that cultural contact 'may be a built-in need' for cohesion in the psycho-physiological constitution of man'. Hill (2006: 210) notes that the worldview of the American Indian 'emphasises connectedness to the creation/universe'. It is argued that as a cultural facet, 'belonging is a component of relatedness and connectedness' (Hill, 2006: 210). A 'sense of belonging is a dynamic phenomenon of social significance', asserts Hill (2006: 214), that can help to aid mental health wellbeing. Saewyc *et al.*'s (2013) search for evidence to support the idea of whether greater cultural connectedness could lower discrimination among indigenous Canadian

adolescents, found those who exhibited high levels of cultural connectedness displayed 'higher self-esteem' and 'healthier youth behaviours'. An earlier study, Poon *et al.* (2010), which assessed whether cultural connectedness was a protective factor in 'risk prevention and health promotion for North American youth', revealed higher cultural connectedness was linked to lower odds of substance use, under age sex and greater odds of higher educational goals and art/club participation. Chandler and Lalonde's (1998: 192) research into suicide among indigenous groups in Canada, revealed 'communities that have taken active steps to preserve and rehabilitate their own cultures are shown to be those in which youth suicide rates are dramatically lower'.

MacKinlay (2010: 16) argues 'meaning is held in connectedness between people' and that a 'meaningful community provides the basis for human flourishing and connectedness'. These observations resonate with the objectives of this research, which seeks to examine the meanings culture holds for rural inhabitants in Charles Town and Seaford Town and how they act towards these interpretations. Understanding these aspects will reveal their motivations for capitalising on their intangible and tangible cultural heritage in pursuit of sustainable rural community tourism. Moreover, it is clear that the concept of cultural connectedness is a significant feature in psychological wellbeing. While research has not yet determined whether it is a preordained human facet, as Berger and Luckmann (1996) surmise, the link with culture is explicit.

Cultural connectedness thus applies to 'culturally shared ways of knowing'; can reveal insights into a culture's perspective; offers 'a shared sense of socially constructed meanings' and fulfils a desire to connect to others and, therefore, to be accepted (Hill, 2006: 212). This idea of connection extends to tourism, whose key tenet is the pursuit of 'otherness' - (Gibson and Connell, 2003: 167) - people take holidays to experience; connect to other cultures. In doing so, one can gain cultural knowledge, insights into another culture's viewpoints and even sharing how others' meanings are constructed and their significance to those concerned. As Kolb (2008: 129) notes, the idea of connected relates to an 'established condition'; in other words, things that have happened; the past. A high proportion of tourism products are primarily based on connections to past intangible and tangible cultural heritage. As culture products, they are recreated, renegotiated and presented as being cultural connected to the present and future, and therefore sustainable.

6. Horizontal and vertical connectedness

Notions of sustainability, psychological wellbeing and development came to the fore at the Rio+20 sustainable development conference in Brazil in June 2012. Helen Clark, administrator for the United Nations Development Programme (UNDP) told the gathering, 'equity, dignity, happiness, sustainability' were fundamental to human existence, yet were absent in GDP accounting formats. 'Progress needs to be defined and measured in a way which accounts for the broader picture of human development and its context,' said Clark (United Nations, 2012). These socio-psychological approaches resonate with ideas of cultural belonging, which at both conscious and unconscious levels encompasses desires that 'satisfy a deep psychological need for a sense of historical continuity, security and identity' (Pinderhughes, 1989: 10). In other words, an awareness or cultural connectedness to the world, which can be seen as 'vertical and horizontal, external and internal' (Pinderhughes, 1989: 10). Cultural belonging is recognition that people are connected to the world vertically and horizontally. Vertical indicates a 'piling up of effects' and horizontal denotes 'interactions' (National Research Council Committee on Geography and Community and Quality of Life: Data Needs for Informed Decision Making, 2002: 56). Viewed correspondingly, vertical relates to 'individuals of varying status and power', while horizontal refers to people of the same standing (Chandra, Acosta and Stern, 2011: 27).

African descendants' determination to maintain cultural connection to Africa, for example, meant keeping intact their values and identification many generations after their forced uprooting (Pinderhughes, 1989). Their cultural assets, such as foods, stories, languages, music, places, religion and spirituality, which are a significant feature of family life and personal development, are intertwined and fundamental to the function of each other. 'Histories come and go', insists Hall (1993: 4), 'peoples come and go, situations change, but somewhere down there is throbbing the culture to which we all belong'. Like Pinderhughes, Hall (1993: 4) argues culture is a platform on which identity is built. 'Something to which we can return, something solid, something fixed, something stabilized, around which we can organize our identities and our sense of belongingness' (Hall, 1993: 4).

Through vertical and horizontal linkages, Pinderhughes (1989: 10) believes cultural identity offers protection against 'emotional cut-off from the past and psychological abandonment in the present'. The idea of 'cultural homelessness' suggests a loss of heritage, racial identity and

sense of belonging, which can lead to self-blame, shame and low self-esteem (Navarrete and Jenkins, 2011: 791). Moreover, eschewing cultural roots and links with reference groups can lead to 'political powerlessness and personal sense of isolation and become vulnerable to cultural ambiguity, negative identity, and psychological conflict' (Pinderhughes, 1989: 4). It is, therefore, crucial to maintain both vertical and horizontal linkages to retain a 'cultural sense of self' and a healthy 'self-esteem' (Pinderhughes, 1989: 10). 'Cultural coherence is necessary for psychological well-being' (Arizpe, 2005: 38). Furthermore, 'being secure in one's own cultural identity enables one to act with greater freedom, flexibility, and openness to others of different background' (McGoldrick cited by Pinderhughes, 1989: 11).

In arguing that research concerned with the "rural" in rural development is antiquated, Ray (1999: 257) believes there should be greater emphasis on the idea of 'territories (that happen to be in rural locations) and/or marginalised social groups (that happen to live in rural areas). The rationale that drives this conception is based on the fact that territorial identity, history and culture are intertwined and 'there is also the psychological issue that the human individual has a need to belong' (Ray, 1999: 263). It is a perspective that provides a platform for endogenous development, to 'raise a community spirit' among local people, boost 'social solidarity' and psychological wellbeing (Ray, 1999: 263). A resilient community, argues Chandra, Acosta and Stern (2011: 31), is one that is interconnected and has the 'presence of strong horizontal and vertical relationships that exist between community residents'. 'People are lost without their traditions, which contribute to mental and physical diseases and disharmony in a society' (Chiweshe, 2010: 15).

7. Vertical connectedness

Vertical connectedness relates to a person's linkage with time, history, continuity, 'collaboration, negotiation, discipline and completion' (Thiele and Marsden, 2002: 4, Pinderhughes, 1989: 10) and is aligned to one's internal feelings, thinking and behaving. A group more vertically aligned, places greater emphasis on ancestral cultural connections. Arce cited by Pinderhughes (1989: 10) explains that vertical connectedness is 'preconscious recognition or traditionally held patterns' of conduct, emotion and reasoning. Drawing on history as a source of empowerment, 'gives a sense of depth, historical belongingness, a feeling of deep-rootedness and sense of a sacred obligation to extend the genea-

logical line' (Mbiti cited by Sherlock and Bennett, 1998: 9). Ethnic identity is an 'essential human need' according to a personal 'sense of belonging and historical continuity based on a common cultural heritage' (Navarrete and Jenkins, 2011: 791). In maintaining vertical linkages, African descendants in Jamaica have retained a sense of psychological cultural wellbeing, identity and an awareness of their reality. The significance of Africa as an ideological symbol provides an internal cultural connectedness, a 'cultural sense of self' and a 'healthy self-esteem' (Pinderhughes, 1989: 10), which, although kept hidden, is of great significance.

Spiritually, MacKinlay (2010: 181) argues, horizontal linkages concern 'a sense of life purpose and life satisfaction' and vertical connects to 'our sense of wellbeing in relation to God'. 'Others have extended this model, where the horizontal typifies spiritual wellbeing derived interpersonally (among other sources), and the vertical transpersonal (a relationship with a higher being [or God])' (MacKinlay, 2010: 181). The intimation that vertical linkage is aligned to the internal means it is a concept that deals with the psychological, the emotional, the private, the hidden, the self. These intramural states, though often not expressed, are highly symbolic and relate to how each individual comprehends and make sense of their existence. African descendants' desire to remain connected to the land of their ancestors, through symbolic, intangible and tangible cultural heritage or otherwise and continue to draw from Africa as a source of empowerment, ties in with notions of vertical connectedness.

8. Horizontal connectedness

Horizontal connectedness refers to an equilibrium; a quantum; the same level of being marked by relationships shaped by interactions and shared experiences. These connections are rooted in 'cooperation, continuity, respect, reliability and trust' (Thiele and Marsden, 2002: 4). Horizontal connectedness, Pinderhughes (1989: 10) states, is representation of contemporary connections to other people who share the 'same ways of thinking and belonging in the world' and 'thus constitutes a bridge to all that is external'. Research exploring the 'importance of place and connectedness' reveals horizontal relationships are shaped by interactions between people, goods and information and 'common experiences' (National Research Council Committee on Geography and Community and Quality of Life: Data Needs for Informed Decision Making, 2002: 71). These observations parallel accounts of the various migrants who made their

way to Jamaica and have enmeshed the various strands of their culture to produce a whole way of life.

9. Tourism connectedness

In a review of 'Cultural tourism as an economic development strategy for ethnic neighbourhoods', Loukaitou-Sideris and Soureli (2012), found that collaborations could benefit from horizontal and vertical linkages. Horizontal connections could create local stakeholder networks, which could secure endorsement, allegiance and corporation with local people, organisations, companies, landlords, artists and young people (Loukaitou-Sideris and Soureli, 2012). Vertical linkages could help garner support from city council officials, museums, tourism information centres and travel agents (Loukaitou-Sideris and Soureli (2012). Such partnerships, within and between communities, could bolster cross-district networks, boost local understanding of the dearth of available assets, create economies of scale and 'account for more effective and innovative synthesis of cultural programs and community economic development' (Loukaitou-Sideris and Soureli, 2012: 65). In assessing 'A community-based tourism model: its conception and use', Okazaki (2008) points to poverty indicators which reveal that it is standard for communities in developing countries to have an abundance of social ties, yet experience chronic hardships. Diversifying external linkages that underpin 'bridging social capital' could open up new avenues to economic opportunities, while extending vertical relationships beyond the locality by connecting to social capital from formal organisations, could yield similar positive benefits (Okazaki, 2008: 516).

In Jamaica, where tourism development is criticised for being unplanned and lacking strategic direction, (Hayle, 2014) advocates notions of horizontal and vertical linkages. 'Tourism is not an end in itself. The role of the community-based tourism projects is to seek opportunities for vertical and horizontal linkages within a community with other industries outside of that community' (Hayle, 2014: 1). Creating such paths, argues Hayle (2014) could pave the way for new businesses and reduce leakages from the island. Similarly, Debes' (2011) contends tourism is based on people using linkages to the past to define them in the present. 'Consuming the past (that is, heritage) becomes a bridge to connect and introduce the people and their identity through a transaction with the tourists' (Debes, 2011: 236). Tourists flock to places and communities; 'historical and mythologized' sites, which 'promise a connection' that might be

idealised or otherwise (Martinez, 2012: 545). They manifest in the 'economization' (Debes, 2011: 236) of cultural assets such as folk storytelling, traditional entertainment and performances, sale of arts and craft, ceremonial vestiges, provision of foods and historical nature trail.

Steiner and Reisinger (2005: 304) argue 'connections among things are the products of history'. They highlight factors like events, discoveries and experiences of people who have existed, which are preserved in 'memories, books, education, socialisations, culture, art myths, and sense of places' and are passed on as heritage (Steiner and Reisinger, 2005: 304). Furthermore, there are practices, representations, expressions, knowledge, skills, instruments, objects, artefacts and cultural spaces, which UNESCO has defined as intangible cultural heritage (Lira and Amoeda, 2009). 'This intangible cultural heritage, transmitted from generation to generation, is constantly recreated by communities and groups in response to their environment, their interaction with nature and their history, and provides them with a sense of identity and continuity' (Lira and Amoeda, 2009: 3). Exploitation of this cultural heritage is the basis for culture's symbiotic relationship with tourism. McCabe (2009) argues tourism is linked to personal and social growth, but also with emotional, psychological wellbeing and satisfying the desire to connect to other cultures. A major reason why people go on holiday is to satisfy their socio-psychological wellbeing (McCabe, 2009). 'People find themselves in their unique place in the world, in a unique situation in relation to the connectedness around them' (Steiner and Reisinger, 2005: 307). This connectedness is to culture, as it is 'lived, experienced, shared and exchanged' (Robinson and Smith, 2006: 10). It is a process that has become increasingly contested and pluralised in reflection of the 'heterogeneous nature of communities' (Cole, 2006: 89) and the varied and differing tastes of tourists for who it is being commoditised. An approach such as horizontal and vertical connectedness offers insights from both internal and external perspectives and is ideally suited to add to understanding of the role of culture in the sustainability of rural community tourism in Jamaica.

10. Connecting to German and Maroon culture

The main data gathering activities focussed on the Maroon enclave of Charles Town and the German district of Seaford Town. Maroons are colonial resistance fighters who were never enslaved and so were more positioned to retain African cultural traditions in comparison to plantation slaves. The

Germans, who were experiencing economic and political strife in their own country, were persuaded to emigrate to Jamaica where economic conditions were said to be more favourable. Further data was produced by semi-structured interviews with cultural and political professionals and organisers in Jamaica. The selected sites faced a myriad of social and economic problems that needed urgent attention. What came across from observations and conversations with people in Charles Town and Seaford Town was the desire to exploit their intangible and tangible cultural heritage to improve their social and economic conditions. This was particularly emphasised in Charles Town where capitalising on their culture for their own benefit was one of the stated goals of the Maroon Council, the governing body in the district. In Seaford Town, there are plans to expand a German heritage museum and build new toilet facilities to attract and cater for tourists. The topic of this paper is based on relevant findings from the full data set, which comprised participant observation, 69 face-to-face semi and unstructured interviews, more than 3,000 digital images, 70 video clips and three focus group interviews.

11. Analysis of data

Production and analysis of data has been guided by the qualitative analysis principles of 'reasoning and argumentation' espoused by Alasuutari (1995: 7). This centered on 'riddle-solving' methods, which are used to explain and make sense of the phenomenon under study (Alasuutari 1995: 7). The process entailed applying equal significance to every 'hint or clue' or 'piece of information' as each was just as important as the other in helping to answer the research question (Alasuutari 1995: 7). Differences in how rural inhabitants describe their way of life were explored. Particular practices, unique expressions, sayings, the way they dressed, the work they did, their relationships with each other and outsiders, their views on political, social and economic conditions were all examined. Alasuutari (1995: 11-12) contends that viewing data as a 'totality', grouping hints and clues together underpinned a research model that 'includes both idiographic and nomothetic elements'. The nature of information provided by participants cannot be said to be homogeneous. 'Holding different speaker's positions', as Alasuutari (1995: 19) concedes, ethnographic participants are 'able to shed light on the structural whole being studied from different points of view'. The information they provide is 'many-sided' – 'folk tales', 'myths', 'proverbs', 'rituals and religious

beliefs', all critical in unriddling; interpreting findings (Alasuurati 1995: 19).

Adhering to these considerations gave rise to themes such as culture connectedness around which the findings of the study are grouped.

12. Participants

Interview participants were selected on the basis of knowledge of rural community tourism development in Jamaica; engagement in the activity; intention to become involved; those who felt they had not benefitted from the activity or had; people who were simply interested in the development of their community by way of culture, agriculture, tourism or other means. Participants were also recruited using snowball sampling techniques as there was 'no list or institution' available to identify frontline staff and key rural community development actors (Deacon *et al.* 1999). This method was appropriate for the 'closed' and 'informal social groupings' of rural communities where recommendations were valuable in 'opening up' channels of communication with prospective participants (Deacon *et al.* 1999). This was to ensure a wide and diverse cross section of participants who would be able to provide a range of views and insights.

13. Seaford Town

Seaford Town is located in northeast Westmoreland, about 42 km from Savanna-la-mar, the parish capital, and has a population of 666 people (SDC, 2010a). The town was founded in 1835 as part of an attempt to populate the Jamaica interior with European immigrants. It was feared that after emancipation, former slaves would quit sugar plantations and hide away in rugged uninhabited terrain like where Seaford Town is now located. This would have crippled the sugar industry so the Jamaican Legislative Assembly offered £15 for each European immigrant brought to the island to live in these locales.

Seaford Town, a 500 acres plot of land donated by Charles Barron Seaford, Governor of Barbados, was one of three locations designated to house such new immigrants. Of the 532 Germans, recruited by Prussian, William Lemonius, from the Westphalia and Waldeck areas of Germany, 249 were settled on the site. Lemonius is said to have tricked the Germans into coming to Jamaica with tales of paradise and the discovery of gold. The Germans included carpenters, shoemakers, masons, a baker, weavers, a blacksmith, tailors,

millers, brick makers, a butcher, a musician and a comedian. When they arrived in Seaford Town, only 29 of the promised cottages were built. Unsited to tropical conditions, 34 of them died in the first fortnight having succumbed to tropical diseases. Food shortages saw many of the Germans raiding the provision grounds of the former slaves they had been recruited to deter.

There are approximately 50 people of full German descent still living in the town. They are mainly third and fourth generation descendants. The town's tourism enterprise is based around a museum housing various artefacts depicting their history and heritage. The Germans are known locally as 'Germaicans', a moniker, which indicates their rootedness to Jamaica. This is visible in the lasting bonds and relationships they have formed with the descendants of Africans with whom they live side by side. Original German architecture and cuisine are very much features of Seaford Town and the local way of life.

14. Charles Town

Charles Town is a Maroon community in the foothills of the spectacular Blue Mountain range. It is primarily agriculturally based and has a population of 740 people (Social Development Commission, 2010b). Charles Town is one of four recognised existing Maroon settlements in Jamaica. The town is steeped in history and is the site of the famous Quao victory over the English Redcoats in 1739.

The defeat of the English led to the signing of a Peace Treaty with the Windward Maroons some 272 years ago. As well as their fighting skills, Maroons, Jamaica's only indigenous group as a by-product of their cohabitation with the Taino Indians, the island's first settlers, are renowned for their resourcefulness in living off their natural environment. However, faced with high rates of unemployment, the Charles Town Maroon Council has initiated a range of programmes aimed at exploiting their culture and heritage by way of tourism and agriculture. Initiatives include beekeeping, nature and heritage tours and a museum incorporating artefacts from Charles Town and the surrounding Maroon villages of Scott's Hall and Moore Town. The annual Quao Day celebrations, held in June each year, attract visitors from around the world. Their fierce opposition to slavery and colonialism has inspired groups like Rastafari and freedom fighters across the world.

15. Data findings in Maroon Town

Just over a decade ago, the Maroons decided to exploit their culture to create employment and improve social conditions. With approximately 50 per cent of people of working age in Charles Town unemployed (Social Development Commission – (SDC), 2006b), the community was in need of income generation strategies. Farming, the main economic activity, had experienced a down turn and many people were having to rely on remittances from abroad and borrowing from each other to survive (SDC, 2006b). There were also issues with moral decline in the community with reports of young people lacking respect for their elders. Concerned Maroon leaders formed a committee, the Maroon Council to orchestrate strategies to exploit their rich cultural heritage. Even though its significance was recognised, there were reservations.

'We were not selling out our culture, but if that is where you can get the help to build your community, then you go there and get the help, (otherwise) culture isn't worthwhile' (Sharon, a female Maroon elder and Charles Town resident, 2011)

Another feature of the development was to ensure the survival of the Maroon legacy.

'There was a concern about the Maroon culture been lost and we wanted something to pass on to our children and grandchildren – that was one of our main objectives' (Sharon, 2011)

According to Charles Town Maroon Chief, Colonel Frank Lumsden, there was a feeling that youths in the community were not aware of what it meant to be a Maroon, an experience that perhaps, could be applied to young people in other communities. However, he argues there is a need to return to conditions of the past.

'We have to go back to some of the values of the past. The way in which mother, father, children relate; the fact that age was venerated; the concept of our spirituality; the way in which we relate to our ancestors' (Lumsden, 2011).

The idea of cultural connectedness is a notion that lies at the heart of Maroon existence. According to Col Lumsden, Charles Town would be like any other inconsequential rural community in Jamaica if it were not for the presence of the Maroons. It is a mnemonic he usually directs at those who question the significance of his people to the town. From being a 'moribund' district, at the foothills of the Blue Mountains, the town is now a thriving Maroon enclave attracting weekly coach loads of tourists. Charles Town's elevation has been pinned to the commoditisation of the Maroons' unique culture, which is the linchpin in their economic regeneration strategy. In June

2012, the Maroon Council received J\$18 million from the Jamaica Social Investment Fund (JSIF) to refurbish the Charles Town Maroon Museum, Safu Yard, a ceremonial communal space, and bathroom facilities. Col Lumsden argues that the best way to protect the legacy of their ancestors is to use it to drive economic development.

'This is the best way of sustaining the culture more so than merely preserving it' (Lumsden, 2011).

According to Col Lumsden, it is the foundations laid by their ancestors that they are building on today. This is what he believes provides the bridge between the past and the future.

'We cannot separate ourselves from our ancestors. If we do not reconnect with our past we will face destruction. Cultural identity is who we are. Cultural identity provides you with an anchor of who you are and what guides you in making decisions' (Lumsden, 2011).

Col Lumsden's pronunciations of connections with their ancestral roots resonate with ideas of vertical linkages. The Maroons continue to maintain strong links with Ghana in West African where many of their rituals and practices such as the Twi language they use and the Kromanti drumming and dancing originates. As for the Colonel, his burning desire is to connect with his African ancestors before he dies.

'If I am a good servant, I will be rewarded. The reward that I want is connection with the other world before I die; that's why I am in Charles Town - to make that connection with the other world before I die' (Lumsden, 2011).

Even though the Maroons' agreement to return run away slaves as part of the 1769 peace treaty remains controversial, observing them and local people's reactions to them suggests they also imbue strong horizontal connectedness.

15. Data findings in German Town

The German descendants in Seaford Town decided to set up a museum in 1999 in an attempt to preserve their heritage and provide an alternative source of income to farming, which has been devastated by the global economic crises. Fifty-seven per cent of women and 40.3 per cent of men in the town are unemployed. The Seaford Town Non-Governmental Organisation (NGO) established the Seaford Town German Heritage Museum as a focal site for visitors as well as to keep alive their heritage, which hitherto had received very little attention. For third generation German descendants like Marian, their parents spoke very little about their European past. Even though they know they have a rich heritage, they

are unsure of the aspects that directly relates to them. It means they have become resigned to their current situatedness.

'I just a Jamaican, basically. The only culture I got is the normal 'duppy' stuff and slavery...' (Marian, daughter of third generation German descendant, 2011).

Eschewing connections with Germany may be an indication that the Seaford Town Germans have finally accepted their fate. 'I think through several generations, there is a very strong emotional attachment to here' (Rita Hilton, first president of the Seaford Town NGO and current treasurer, 2011). A further indication of this is that members of the Seaford Town German community exhibit a sense of pride at being considered 'Germaicans'. As far as Delroy, 70, a third generation German descendant, is concerned, Jamaica is where he was born and, therefore, he is Jamaican. Even though Jamaicans of African descent speak of a longing to return to the land of their ancestors, Delroy does not harbour similar feelings for Germany.

'It is my Motherland, but I don't know anything about it, and I have the sixth sense to tell me that if I stay in Jamaica I will survive better' (Delroy, 2011).

However, there appears to be resentment at how they ended up in Jamaica. In many ways their story bears some similarities with the deceit, greed and hardships surrounding the narrative of slavery.

'When they brought the people here, they put them in slavery, because the people never knew how to cope' (Delroy, 2011).

Delroy says he does not blame Germany for what happened to his predecessor and even though he has accepted his fate, some local people in Seaford Town believe not maintaining a cultural connection with the European country, like African Jamaicans have with Africa, has had a psychological effect. Hilton argues that even though they accept their German origin, they don't quite understand the 'fullness of it' (Hilton, 2011). As a result, she says, the Seaford Town Germans are a 'little bit lost'.

'Someone was saying that they were Germans living in a remote, very remote place like on top of a hill totally cut off from that time, but you can't live in isolation, you must be part of a global network' (Hilton, 2011).

Hilton argues that even after such a period it was still important to try to re-establish links between the Seaford Town Germans and Germany, if not for the sake of the older generation, then for the younger ones. She believes this is important because of the rural nature of the community mean young people are not as exposed as their urban counterparts.

16. Discussion

African Jamaicans' desire to remain connected to the land of their ancestors, through symbolic, intangible or tangible heritage or otherwise, and draw from as a source of empowerment, ties in with notions of vertical connectedness. Using history for empowerment, 'gives a sense of depth, historical belongingness, a feeling of deep-rootedness and sense of a sacred obligation to extend the genealogical line' (Mbiti in Sherlock and Bennett, 1998: 9). In maintaining these vertical linkages, the Maroons exude a sense of psychological cultural wellbeing, identity and an awareness of their reality. 'Civilisation begins with the African yuh nuh (you know),' asserts Col Prehay, a Maroon Chief. 'And, creation begin in a Africa, so me would a like guh (go) back man,' he added, confidently.

In Jamaica, the Maroons are revered both locally and nationally for their fearlessness in resisting the yolk of slavery. This bond or bridge to their fellow Jamaicans connotes with the idea of horizontal linkages. Their indomitable spirit of having played a critical part in ending slavery strengthens their external ties. Since deciding to exploit their cultural connectedness by way of rural community tourism, the Maroons have transformed what has been described as a 'moribund' district into a thriving enclave attracting two coaches of visitors each week. They say this has helped them to earn a living at the same time as sustaining their heritage for future generations.

The idea of the German descendants of Seaford Town being 'lost' is a clear indication of 'emotional cutoff from the past and psychological abandonment in the present' (Pinderhughes, 1989: 10). This psychological malaise could be related to a lack of vertical connectedness to their ancestral roots in Germany. One respondent described the Germans as a 'reserve people', in that they were reluctant to put themselves forward for community development activities. They were also said to be passive', which may have resulted from their expectations not being met when they came to Jamaica. The respondent remarked, they have turned in on themselves, 'like going into your house, closing the door and not caring what's outside'. Even though the Germans acknowledge they have a strong history, their vertical linkages are weak. As one respondent stated their parents never talked about their German connections, which suggest their cultural heritage, is not being passed on, which makes for a less sustainable way of life in relation to psychological and emotional wellbeing.

Despite this, in asserting their 'Germaicanness', thereby integrating with fellow Jamaicans, they

draw strength from the idea of horizontal connectedness. This suggests the German descendants of Seaford are only interested in the present and the people they intend to share their future with. The Seaford Town NGO is making attempts to expand their German heritage museum, but they complain of a lack of interest by the people of German descendants, which hampers progress. Tourists used to visit on a regular basis, but numbers are now a trickle.

This study has revealed that horizontal and vertical linkages are indeed critical in giving local people the confidence in asserting a sense of self in their attempts to improve their conditions. The implications of these findings for rural community-based tourism policy, is that rural community tourism development needs to embrace factors such as emotional and psychological wellbeing to ensure sustainability. As Pinderhughes (1989: 10) notes, the idea of continuity bolsters security and identity. And, cultural identity offers protection against 'emotional cutoff from the past and psychological abandonment in the present' (Pinderhughes 1989: 10).

As a limitation of the study, time constraints stand out restricting detailed data collection to only two communities, therefore the findings are but a synopsis of the full picture of the role of culture and tourism in the sustainable development of rural communities in Jamaica. Furthermore, culture is a fluid ever-changing concept and a longitudinal study would, perhaps, capture more of the unfolding metamorphoses over an extensive period. Additionally, given the diversity of Jamaican communities, future studies could ensure a broader sample size, which would reflect a more exhaustive picture of the role of culture and tourism in the sustainable development of rural communities in Jamaica.

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Tourist routes strategies of local development

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Abstract: Tourism as an economic activity can contribute to the social, economic and cultural development of a region. In order to understand these dynamics, it is important not only to introduce the guiding principles of development, but also to think about strategies to implement and develop the activity in specific regions. The positive and negative factors of tourism can be shown based on the peculiar characteristics of each area. However, rather than a general discussion of the problem, this study presents the planning and management strategies of tourism of the Vale dos Vinhedos (Valley of Vineyards) Wine Route, which is presented as a case study of designing tourist routes yielding local development.

Key Words: tourism strategy, local development, Vale dos Vinhedos, tourist route., rural tourism.

Rutas turísticas y estrategias de desarrollo local

Resumen: El turismo como actividad económica puede contribuir al desarrollo social, económico y cultural de una región. Para entender estas dinámicas, es importante no sólo para introducir los principios rectores del desarrollo, sino también para pensar en estrategias para implementar y desarrollar la actividad en regiones específicas. Los factores positivos y negativos del turismo se pueden mostrar en base a las características peculiares de cada área. Sin embargo, en lugar de una discusión general del problema, este estudio presenta las estrategias de planificación y gestión del turismo en la Ruta del Vino del Valle de los Viñedos como un estudio de caso de estudio de rutas turísticas que visan el desarrollo local.

Palabras Clave: estrategia de turismo, desarrollo local, Vale dos Vinhedos, ruta turística, turismo rural.

1. Introduction

Tourism today is seen as an economic solution for many municipalities, and it often acts as an incentive to non-agricultural activities in marginalized rural areas. The reason for this role and potential of rural tourism can be found in the return of "urban man" to the countryside. In the 1980s, rural life became a tourist attraction, not only for environmentalists and nature lovers, but also for urban families seeking a life free from exposure to contamination by chemicals and to the noises and disturbances of urban spaces. According to Kosmaczewska (2008), agritourism has

the capacity to influence the income of the local community, but there is difficulty in understanding the difference between agriculture and tourism. For Kosmaczewska (2008), tourism in rural areas needs to bring results to the community as well as to the visitor.

Due to this new demand, rural tourism became a major promoter of sustainable local development, helping to improve the quality of life of rural populations. This activity meets the need for new alternatives to keep man living with dignity in rural spaces, at the same time preventing the disorganized rise of urban agglomerations without the equipment and services, which allow living

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according to the standard of living criteria recommended by the United Nations program, which looks at the HDI (Human Development Index) of each country. However, the tourist demand for rural spaces also exposed the general difficulty for inhabitants of rural areas to supply services and products with the quality usually expected by tourists.

The rural tourist experience in particular must be understood as the overall experience of a large number and diversity of resources, attractions, services, people and environments offered by a destination, not all principally designed for tourist use, but all of which impact on the experience and are potentially sought out and valued by tourists. (Ribeiro and Marques, 2002)

The purpose of this study is based on Mintzberg *et al.* (2000) theory of intended, emerging and fulfilled strategies, to find out whether the proposals for the management of regional tourism development in the Vale dos Vinhedos Wine Route fit this model. The article is organized as follows: first, the theoretical foundation for strategic theories and regional tourism development is presented and then the case of the Vale dos Vinhedos Wine Route is analyzed as a model to apply development strategies according to the concepts formulated by Mintzberg *et al.* (2000).

The study aims to discuss theoretically the mechanisms responsible for the efficiency and effectiveness of the wine tourism economy and therefore considers the segments responsible for the sustainable economic development of the Vale dos Vinhedos Wine Route. The methodology was exploratory, based on a descriptive case study, with qualitative research. Data were collected in 2007 through convenience interviews with 15 winemakers and agents of tourism in the Valley of the Vineyards Route, with representatives from the public sector (Secretary for Development, Tourism Secretary and the Deputy Mayor of Bento Gonçalves – Rio Grande do Sul) and representatives of the sector entities under study, namely APROVALE, ATUASERRA, EMBRAPA-Grape and Wine, which are wine producing associations which promote local development.

2. Rural Tourism

This paper follows Holloway's concept of tourism (1994), which defines it mainly as an industry supported by a chain of several intervening sectors that intersect and complement each other. When tourism in rural areas is analyzed, it is considered here as a non-agricultural activity that is supported by agricultural activities. According to

Schneider (2005) the growth of non-agricultural activities in rural environment is contributing to the development of pluri-activity based rural households. It should be pointed out that tourism is not the only activity that can complete and reinforce agricultural activities, as is the case of services, communications, handicrafts and others, depending on local peculiarities. All of them, especially rural tourism, create new jobs and redesign the rural economic space itself. Rural tourism induces the growth of non-agricultural occupations in the rural environment (Silva, 1997).

According to Martínéz and Monzonís (2000: 10), rural tourism can be described as an activity that is able to join the characteristics of supply and the motivation of tourist demand. Thus, they define it as tourist activity performed in a rural space, consisting of a demand-oriented offer integrated with leisure, whose main motivation is the contact with the rural surroundings combined with relationships with local society. Silva *et al.* (1998) believe that rural tourism generates occupations that complement agricultural activities and it becomes part of the daily life on farms, whose extent depending on the specific farm.

Rural tourism plays a major role in the retention of inhabitants in rural spaces, since it helps keep individuals professionally active, not only in agricultural activities, but especially in rural spaces. It is thus an important factor to reduce migratory flow to the urban areas. This new tendency, according to Ramon (1995: 98), is called neo-ruralism. In Brazil, the rural tourism program is being implemented by EMBRATUR, the Brazilian tourism authority, and its purpose is to regulate this tourism activity, whose focus of attraction is the relationship between man and the rural environment. This type of leisure/tourism is reflected in weekend trips, in which the tourist travels more often for short stays.

According to Beni (2002:), in a business-oriented analysis, rural tourism is the name given to travel to rural spaces in programmed or spontaneous itineraries, staying overnight or not, in order to enjoy the scenery and the facilities of the countryside. The author stresses that roads, routes, and forms of development are rarely compatible and comparable, since in each country, region, municipality or place a number of factors interact: economic, social, political and cultural, which over time are molded into a specific, unique form of tourism, which is precisely why they are so attractive.

The perspective of this rural new world creates a content which provides sustainability to local development, seen as "the actions of man within a specific territory, providing appropriate direction to building equipment and facilities, thus avoiding

the negative effects on resources, which destroy them or reduce their attractiveness.” (Ruschmann, 1997: 165). If new alternatives for local development are possible, a new rural territory can be observed for production and consumption by the urban-industrial society, where the countryside has been characterized as a reference of a good place to live. Thus, new development opportunities arise, such as leisure associated with living in the natural environment, like through ecological tourism, appreciating rural handicrafts, visiting family agribusinesses, wine-tasting and others. In this way, a new process began to sustain the development of rural spaces where the elements of local culture are taken over by new values, habits and techniques.

The development process began to be seen not only as basically economic, but also as political, cultural and geographic, within a social context of production of wealth, life in society, cultural exchange relations, and others (Beni, 2002). Thus, government strategies began to include forms of social control, with the crucial participation of the actors in the process of defining productive activities within the geographic/social/economic territory.

2.1. Strategy and Planning

Mintzberg (Mintzberg *et al.*, 2000:125) defines strategy broadly and eclectically, emphasizing that the definition cannot be simplified and needs multiple approaches. Therefore, he proposes five definitions, which he calls “the 5 Ps of strategy”: Plan, Ploy, Pattern, Position and Perspective. In another work (Mintzberg *et al.*, 2000), the same author catalogues ten different views on the process of strategy, or ten schools to formulate a strategy, namely: design, planning, positioning, entrepreneurial, cognitive, learning, power, cultural, environmental and configuration.

Therefore, the strategic plan is formulated to allow the company to position itself in its environment. Given this complementariness, strategy is described by Henderson (1989: 8) as the deliberate search for an action plan to develop and adjust the competitive advantage of a company (a concept of competition that originates in positioning). In strategy as a perspective, Mintzberg (1996:15) looks into the organization, into the minds of its strategists and upwards to the great vision of the company. The content is not only the position chosen, but also the rooted (and shared) way of seeing the world.

Ohmae (1998: 55) states that in developing the strategy it is important to take competition into account, but not to put it first and foremost.

According to the author, strategy does not mean defeating competition, but working to understand the inherent needs of the customers and, consequently, developing an appropriate product to meet those needs, not only an improved version of the competitors' products.

Ansoff and McDonell (1993: 295) believe that, especially since the external environment of the company has become increasingly changeable and discontinuous compared to the past, the importance of strategic management has grown, because the objectives, by themselves, are not sufficient as rules of decision to help guide the company to adapt to new challenges, threats and opportunities. The State's intervention in this new rural space must be strategic in the same sense as the 5 Ps suggested by Mintzberg *et al.* (2001), and reposition this space needs to take into account both agricultural and non-agricultural activities. For this purpose, it has to create the infrastructural conditions for local development.

2.2. From rural development to local development

The study of innovation propensity begins with the work of Schumpeter (Theory of Economic Development, 1982), which discusses the action of innovation as creating breakdown processes in the economic system, affecting the equilibrium of the circular flow. This breakdown process (introduction of innovation) is caused by the entrepreneur who has the ability to be the first to introduce new combinations of productive means, thus transforming the established circular flow.

Therefore, innovations in Schumpeter's conditions (1982) are represented by new combinations of production, which arise discontinuously, a completely revolutionary process in the status of economic development, thus replacing the traditional form of competition (price competition). The former is considered a steady state and gradual process. Economic development, on the other hand, is a phenomenon of spontaneous, discontinuous change in the flow channels, a disturbed equilibrium, which forever alters and displaces the previous state of equilibrium (Schumpeter, 1982: 47).

Rural development in its classical interpretation has been identified as a “Green Revolution”¹, by incrementing chemical and biological processes of agricultural products, based on the development of large-scale production factors. This process caused the industrialization of small farms in order to respond to increasingly demanding and dynamic mass consumption. In this scenario, reproduction characteristics of the “mercantilist system” can be identified, focusing on international, unilateral and very aggressive trade. In developing countries, this

meant to export all possible economic resources produced. In this sense, the only function of the State was to foster agricultural productivity in order to meet the demand for major agricultural commodities, without much concern for the social wellbeing of the marginalized populations who, for several reasons, had not been touched by the "Green Revolution" that began in the 1950s.

The possibility of development being seen from a local perspective appeared as a new way of promoting more sustainable mechanisms to maintain the community's economy. The strategies then became finding or arousing local vocations, developing specific potentials, fostering external research using local productive advantages. Here, the concept of "local" should not be confused with small, and it does not necessarily refer to diminishing or reducing. On the contrary, "local" is not a micro space, and it can be a Municipality, which is equivalent to a county, or even a region including several municipalities (Presidência da República do Brasil, 1998: 4).

Thus, it uses the endogenous resources and potentials; it seeks to stimulate the participation and involvement of local populations, promoting an effort to bring together several interests of different interveners. Along similar lines, Sen (1999: 52) refers to development as an "essentially friendly" process, which may be exemplified by beneficial exchanges, the work of social security nets, political liberties or social development, or one or the other combination of these supporting activities.

In this sense, development is essentially a strategy for interrelated actions, in which the nature of the disequilibrium process is overcome by the equilibrium of the trajectory of the main economic and social variables: "From this perspective, people have to be seen as actively involved [...] in shaping their own destiny, and not only as passive beneficiaries of the fruits of ingenious development programs (Sen, 1999: 71)". On the other hand, according to Souza (1999), in a more traditional perspective of the economy, development involves qualitative changes in people's way of life, institutions and productive structures. In this sense, development is characterized by the transformation of a modern, efficient economy, together with the improvement of the way of life of the population as a whole. This discussion is coherent with a new concept of sustainability, which studies simultaneously economic, social and environmental concepts of sustainability.

There are several approaches to local development, such as industrial districts, localized productive systems and innovative procedures. However, the common trait among them is that these are experiences of development based on endogenous

forces, where the institutions and local authorities play their own economic roles, independent of the central State (or of other instances above them). The local economy seeks its dynamics in factors that are peculiar to it, from its past, with roots in local history, often in geophysical conditions, but also in cultural traits and technical-artisanal wisdom rooted in the social-territorial unit.

The local actors (persons and institutions) play a crucial role in a context in which the economic logic is not always dominant. Cooperative practices and collective initiatives have been cited in the literature as decisive factors to strengthen the local social tissue, often providing economic advantages, which would not be obtained otherwise. The strength of local development derives from the social tissue as a whole, since it is based on the human aptitudes filtered through historical, social and natural factors. As a matter of fact,

(...) the experiences of local development show the local collectivities' capacity to adapt to the impositions of internationalization of competition based on their potential for organization. It is found that there are very local organizations that respond to the uniformity of behaviors caused by globalization of exchanges, and allow finding more effective forms of enhancing wealth (...)" (Pecqueur, 1996: 19).

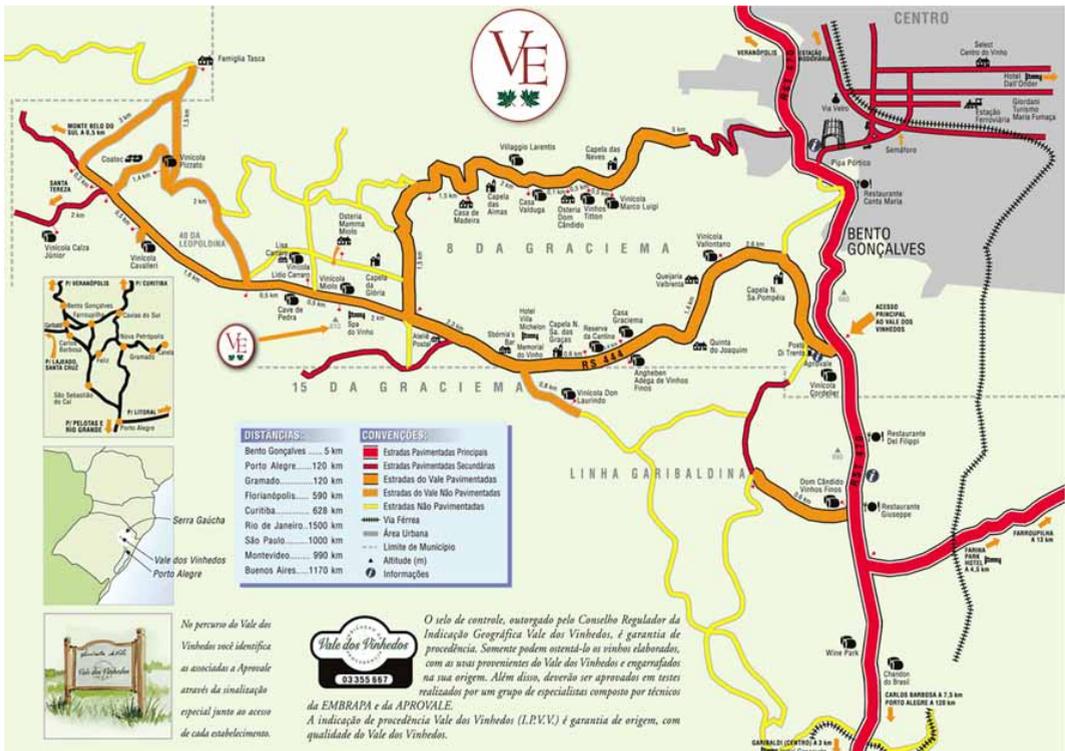
In the view of Sengenberger (1993: 355), local development is a new proposal for socioeconomic leverage, where thanks to a better use of resources, improved collaboration among companies, skilled workers for endogenous demand, and other factors, local economies can promote comparative advantages, responding to the unavoidable imperatives of efficiency and innovation. According to this author, local development transcends immediate economic interests, insofar as it mobilizes citizens to participate in the social, political and cultural life of the region, helping strengthen regional identity.

3. The Vale dos Vinhedos Wine Route: a strategy integrated to local development

A wine region is a geographic area where grapes are grown and harvested on a large scale in order to obtain their derived products such as juice, wine and raisins. Wineries currently assume the technological processes for harvesting, pressing and vinification. In Brazil, the efforts of the grape growers have resulted in the expansion of the grape growing and winemaking industry.

Vale dos Vinhedos is known for the valleys that constitute its natural and man-shaped landscape. This region is located in the Serra Gaúcha Mountains, between the municipalities of Bento

Figure 1. Map of the Vale dos Vinhedos.



Source: www.aprovale.com.br, 2012.

Gonçalves, Garibaldi and Monte Belo do Sul. Currently, the municipality of Bento Gonçalves has four districts and the last to be created, in 1990, was Vale dos Vinhedos. An area was separated from Monte Belo do Sul, which had not yet become emancipated from Bento Gonçalves, together with another area belonging to the district seat, to form this new district.

Italian immigrants who came to Brazil seeking lands and prosperity first settled in the valley. They farmed the land and their life in the region was not characterized only by grains, vegetables and livestock. They brought many cultural elements with them, including growing grapes, wine making and drinking. A characteristic of the Vale dos Vinhedos Wine Route (Figure 1) is that it concentrates some of the main wineries in Brazil, both as companies and as cooperatives, as well as small and medium-sized wineries, agribusinesses, family farms (mostly grape growing) and an expanding organization of tourism around wine production and the rural landscape. A structure to promote the image of wine in association with the rural (agricultural and ecological) landscape and gastronomy

is identified as a planning and positioning strategy. This seeks to strengthen both the tourism industry directly, and grape growing and winemaking in particular, which depend partly on the same thing, in their promotional strategies. In 1995, in order to add potential to the development and planning strategies of the tourist economy in the region, APROVALE² was founded aiming at furthering tourist activity and the competitiveness of the wineries in the region, and to protect the social and cultural heritage of the Route.

According to Aprovale, Vale dos Vinhedos is the right route for people who wish to learn about the grape and wine culture. Achieving the Seal of Indication of Origin of Vale dos Vinhedos (I.P.V.V.)³ ensures the original quality of what is produced in the region, distinguishing it from the others. Only wines made from Vale dos Vinhedos grapes and bottled at the source can use the seal, and they must also be approved in tests performed by a group of specialists consisting of specialists from EMBRAPA- Grap and Wine (the Brazilian Agency for Agriculture - Grapes and Wine), and APROVALE.

Thanks to the work of APROVALE and entrepreneurs in the winemaking sector, together with the actions of the government and the local community, the valley and its products have received the Registration of Protected Designation of Origin. This strategy shows that local stakeholders seek a high standard of quality (Mintzberg, 1996). Theoretically, the importance assigned to the quality of products produced in the region improves competitiveness and strengthens the winemaking industry. Looking at it from this perspective, the strategy utilized may develop certain competencies present in the Route, which tend to support or redirect this pattern, based on the resources and competencies developed and controlled by the wineries associated with "APROVALE", and later in the competitive environment in which they are positioned.

Enhancing the production of local goods based on territorial resources may make the economic tissue more dynamic (bringing back traditional activities, stimulating new jobs) and also help reinforce its identity, bringing the population closer to the territory. At the same time, the need arose to encourage consumption of these products. Commercialization began for this purpose. Forms of promotion, dissemination and distribution were organized. Based on this example, one may conclude that once the regions' value is acknowledged, the population seeks ways to render their resources more profitable, taking an active role and intervening in the development process of their territory.

The tourism development strategy of the Vale dos Vinhedos Wine Route is clearly based on a rural space where values and identities that determine local communities are still preserved, due to the culture introduced and maintained alive basically by Italian immigrants. In this context of development, visibly, the region's agriculture has taken on a multifunctional role, not only offering consumers agricultural products, but also including other roles involving the integration of diverse economic activities.

Taking a different look at "development", and considering the individual, rural areas might be considered potential sites for industrialization (agribusiness) and social development. This not only provides better quality of life for those who remain in rural areas, it also increases the potential provision of products for urban areas. Development requires the rational use of resources. This statement involves the importance of territories as a support for the effective management of natural, cultural, human and economic resources. Territories cannot be taken as a simple geographic reality, a physical support of life. Enhancing means acknowledging and using. For instance, on the Vale do Vinhedos Route, an action strategy of public policies

that can be identified is local development, where the social relationships of production actually occur.

Thus, the advantage of a country, region or locality is acquired in relation to its learning capacity, which is the essential condition for the process of innovation and consequent development. These aspects indicate the importance of economic and non-economic factors in the learning, innovation and competition processes that are rooted in each locality, immersed in the local culture.

The public sector initiatives for the region can be classified according to Mintzberg (1996), as training, structuring and business strategies, according to the summary table 1:

According to a report by the municipal government representatives (as transmitted in the interviews held on May 29th, 2007 and July 3rd, 2006), these actions have been implemented and are being monitored by the evaluation of local actors and visitors. Analyzing the information, giving more relevance to the literature by Mintzberg *et al.* (2000), it could be concluded that the Vale dos Vinhedos Wine Route still lacks strategic actions to promote local development. It is noted that the emerging and most significant initiatives have been taken by private enterprises and institutions connected to the wine and tourism industry in the region (Table 1).

According to Table 1, the elements necessary for sustainable economic development, it is necessary to invest in training, in public policy structures and in promoting local business. In Brazil, the Ministry of Tourism conducted a study to assess the competitiveness of tourist destinations. This study encourages development, which evaluated the structure of tourism destinations under five macro dimensions: infrastructure, tourism, public policy, economics and sustainability (Barbosa, 2002). As shown in Table 1, the results of the research in the Vale de Vinhedos Wine Route, it is clear that the participation of local actors is still incipient, regarding the potential of collaborating with supporting institutions and the government. Thus, it reflects the structural conditions and the strategies for promoting business.

Thus, in the strategies chosen, the interaction of the actors with their peers needs to be stimulated, and then coordinated with the State, research/teaching institutions, and the players within the value chain of tourism and wine production. Only with this collaboration amongst central local stakeholders and based on endogenous resources, one may yield sustainable development (Saxena *et al.*, 2008).

Here, it becomes clear that the local development model is in fact to be structured based on the local potential, and not by central planning or exogenous

Summary Table 1. Structuring and business strategies

| Training | Structure | Business |
|--|---|---|
| Activities that promote the community's sensibility for tourism; Dissemination and institutional promotion of the attractions of the region and the itinerary for tourism on the Vale dos Vinhedos Wine Route using videos, folders, lectures and film; Technical and administrative support to perform an inventory of tourism assets in the region, in partnership with the University of Caxias do Sul. | Preparing the structure of the Rural Master Plan; Adapting infrastructure services such as water supply in the localities, public lighting and paved municipal roads; Restoring and painting the columns at the side of roads and highways; Supporting the businesses, especially wineries, making access easier | Support for cultural projects such as the hot spiced wine ("quentão") festival, and the Vale dos Vinhedos choir; Negotiation of a partnership with the Visa credit card company. |

Source: adapted by the authors, based on Mintzberg (1996).

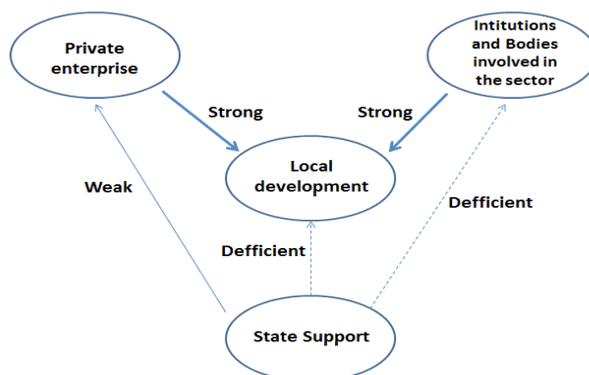
forces, but the structure is now developed through a process already set by local actors, through broadening the base of autonomous decisions (Boisier, 2005). Therefore, the strength of local development comes from the whole social fabric as a central part of human skills, filtered by historical, social and natural factors.

However, the role of the state in the Route's political and administrative status happens to be one of the decisive factors for the local development initiatives. It is also critical to strategic bargaining between local socio-economic actors (business associations, financial institutions, advisory centers for companies, universities and research institutes and development agencies, among others), to seek joint access to new technological innovations and organizational and productive advantages in the business context. Local development was considered

based on Figure 2, showing local development as depending on other sectors.

The interviews were conducted in the period May-July 2007 with the residents of the Vale dos Vinhedos. The questions were semi-structured, sent via e-mail and answered by representatives of ATUASERRA, APROVALE, and representative of the secretary of the public sector in Bento Gonçalves, RS, and tourism agents. Through the data, we can observe the behavior of the main actors involved in local perspectives of local development.

Figure 2, shows the involved segments of actions and reactions in the face of potential and latent needs in the Vale dos Vinhedos: The actions of the private sector represented here by companies in the wine industry and the tourism sector in the region; educational and research institutions and entities of the wine industry and tourism; and followed by proposals for public policy of the State

Figure 2. Local development as depending on other sectors

Source: Authors, 2010

to encourage the wine and tourism economy in the Vale dos Vinhedos.

The analysis of the interviews show that private enterprise and the grape growing and winemaking industry bodies provide strong support to local development, but that government initiatives are insufficient. At the same time, government support is also seen to be deficient, followed by weak support from the institutions and bodies of the grape growing and winemaking sector to private enterprise, as seen in figure 2. One of the main goals of planning in tourism is to organize integrated opportunity spaces in order to create a complete product and thus develop a marketing differential. According to Smith (1988: 85), tourism as a product is a composition of everything that can be consumed, tried, observed and appreciated during a trip.

Vale dos Vinhedos offers its tourist products in the form of routes, identified as "tourist routes"⁴ which are no longer a novelty in the world of leisure options, in recent years. However, the configuration of space is important in tourism development as a possibility of producing enchantment, fantasy and fulfillment, since objectively space only exists in its relationship with human awareness. In this sense, tourists consume a global product that is the result of travel experience as a whole. The offer of this global product results in the intervention of a network responsible for producing tourism by-products (accommodation, transport, restaurants, attractions), which, as a whole, constitute the different components of the tourism product from a global perspective. Staying at a hotel, having a meal at a regional restaurant, visiting the museum and the places where tourists receive information, such as the tourist information center, or purchasing handicrafts at local shops, are a few examples of by-products consumed by tourists during their stay in a given region.

Consequently, the products, goods or services that a municipality or region can offer to visitors, because of their structure, complexity and heterogeneity, compose an ensemble of economic, social and cultural activities. Likewise, it is important to emphasize that tourism planning must be carefully carried out in a region in order to avoid needless expenses, local imbalances and negative social and cultural consequences.

The place is regarded as the result of the cluster configuration of social relations. It is also the place where culture and other features are fixed in a not transferable manner. Bava (1996) emphasizes that the endogenous development born out of the internal forces of the community, also constitutes a whole, with ecological, cultural, social, economic, institutional and political dimensions, and

that the goal of action should be to integrate all these dimensions. However, the support of local development means not only enhancing business performance, but also the ability of local actors to undertake coordinated action in pursuit of common strategies.

However, the peculiarity of developing wine routes consists in potentiating the tourist activity through the setting into value of wine production, often centered around the associated habits, customs, climate, traditions, culture and landscape. This leads to the need of assuring the coordination between the various dimensions of the experience and corresponding actors involved in all segments of the economy with a market-oriented perspective. This idea fits into the concept of sustainable local development.

In addition to being a space for environmental conservation, country life began to be seen by those responsible for framing public policies also as an opportunity to create new forms of work and income for the population segments that live there, and who generally do not have the necessary qualification to become part of the expanding urban sectors or may, indeed, not wish to move away from their land.

The position of the development proposal for Vale dos Vinhedos is based on the interrelationship of economic activities around the wine production process, which is also multifaceted, trying to integrate two main activities: grape growing and winemaking and tourism. These sectors may enhance not only economic prosperity, but also the socio-cultural well-being and reinforce regional identity in the relationship among the economic, social and cultural players present in the region.

4. Final Considerations

The productive process in tourism is neither totally autonomous nor unique. Several sectors are responsible for producing tourism products, which seems to be particularly true for rural tourism. Thus, it might be said that besides generating income, particularly foreign currency, tourism can integrate the local economy and generate complementary products, which are not necessarily agricultural, but add to the tourist experience and foster local development.

There is a growing perception that well-formulated and appropriately implemented strategies are crucial factors for the organizations to become successful in their aims, thanks to the greater internal alignment around their overall objectives, the positioning of the organization towards the environment in which it acts, and to maintaining consistency over time.

Consequently, tourist activities can only be efficient and viable over a medium and long-term horizon, if the resources they depend on are maintained and even improved. Attention must be given to territorial organization and environmental quality, and strategic actions to certify the quality of tourist services.

Since experiences in local development are the result of a particular combination of historical, social, economic and geographic factors, it should be emphasized that, at most, each case is unique and, consequently, the phenomenon cannot be deliberately reproduced elsewhere. It is therefore difficult to take it as a model, which, however, is often done when framing policies with the intention of creating development in a given region.

It should be pointed out that even if local development is based on enhancing internal resources of the region, this does not mean that we are looking at an autarchic form of development, which would not make the least sense in a relational economy like the current one. Local development cannot be seen as a “closed” experience, whose success comes from this closing or self-sufficiency. On the contrary, local development is an ambition which needs to set into value relationships and also exchanges with the outside for its own benefit. These relationships are, therefore, subject to certain conditions and articulated with regional needs. The winning regions are precisely those that find their own mode of integration in the national and international markets, not those that close themselves away.

According Kastenholz *et al.* (2012), strategy for local tourism, is based on the creation of distinct brands, local products, and networking among stakeholders in the tourism sector. Also Kastenholz *et al.* (2012) warns against the lack of an integrated strategy vision for the region, and that sub-optimal use of existing infrastructure becomes a constraint to local development process. Dealing with local development, however, is a demanding task. Sustaining a development process depends not only on the performance of local businesses, but also, and especially, on the capacity of local agents to undertake coordinated action in search of common strategies. This idea is part of the concept of local development.

The definition and implementation of tourism development strategies is the individual and shared responsibility of the different actors involved. However, the State, in its different spheres, should define sectorial policies that may positively influence the tourism activity. In the case studied, it was seen that the State has not provided the necessary infrastructural support for the region to integrate different activities and consolidate it as an attractive rural space for tourists. In order for this to occur, it

is necessary to be aware that the development of rural zones must be conceived globally, integrating economic, social and cultural dimensions, and, finally acknowledge that this development is based on people and on dynamic rural communities.

Tourism, as opposed to other sectors, is characterized by the market coming to the product. For effective consumption of tourism as a product, the tourist will have to travel to the structure that supports his/her experience: *the tourist destination*. It is impossible to dissociate an approach to the product in tourism from the tourist destination. Indeed, this element favors the development of positioning, environment and configuration strategies for the central region of the tourist activity.

Finally, specific characteristics of this activity, which are generally identified in all of regions as fundamental for local development are: (a) transformation of local resources into wealth; (b) the understanding of tourism as an economic activity by the local community; (c) stimulating the creation of local infrastructures.

Only by developing a tourism system well integrated into the local economic and social structure can local development be sustainably achieved.

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Notes

- ¹ "Green revolution" is the name used for the productive process that appeared in the 1950s, prioritizing the use of agrochemicals in agricultural crops.
- ² Associação dos Produtores de Vinhos Finos do Vale dos Vinhedos (Association of Fine Wine Producers of Vale dos vinhedos).
- ³ Established in 2001, the PI "Vale dos Vinhedos" for wines from the 81 square kilometer region lying between the municipalities of Bento Gonçalves, Garibaldi and Monte Belo do Sul, in the state of Rio Grande do Sul.
- ⁴ Routes are itineraries followed by tourists in order to enjoy a context, seen as a whole, in an organized, attractive manner.

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The importance of sustainable tourism in reversing the trend in the economic downturn and population decline of rural communities

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Abstract: Across the world there is an ever increasing trend of human migration from rural areas and in particular small settlements to urban centres. Migration to urban centres is most prevalent in the young adult age groups, which affects traditional industries such as agriculture and associated services, and thus threatens the sustainability of rural settlements. In some rural towns, a decline in population and agriculture has led to their social and economic deterioration. This paper presents small settlements, two in Italy and two in Australia, which have leveraged locality very effectively to develop a thriving tourist industry. The study provides a comparison and evaluation of data on visitor numbers and tourism expenditure in these regions demonstrating success and growth trends. It is shown how various industries other than tourism often in conjunction with unique characteristics or assets of an area create a major draw card for tourists. Thus providing significant economic, social and environmental benefits to these areas.

Key Words: rural tourism, population trends, sustainable tourism, resilient communities, rural economic growth, socio-economic sustainability, rural assets

La importancia del turismo sostenible en la reversión de la tendencia de la desaceleración económica y la población declive de las comunidades rurales

Resumen: A nivel mundial existe una tendencia cada vez mayor de desplazamiento de personas en zonas rurales, particularmente en pequeños asentamientos, a los centros urbanos. Este desplazamiento es más común en grupos de edad jóvenes, afectando industrias tradicionales como la agricultura y sus servicios asociados, amenazando por ende la sostenibilidad de asentamientos rurales. En algunos pueblos de zonas rurales, la disminución de población y reducción de la agricultura ha conducido a su deterioro social y económico. Este artículo presenta el caso de pequeños asentamientos, dos en Italia y dos en Australia en los cuales se ha eficazmente fortalecido la localidad para desarrollar una próspera industria del turismo. Este artículo provee una comparación y evaluación de los registros del número de visitantes y el aporte del turismo en estas regiones, demostrando su éxito y tendencias de crecimiento. También se presenta como a menudo otras industrias, aparte del turismo en conjunto con características únicas o activos de una zona, crean un atractivo importante para los turistas. De este modo se están proporcionando beneficios económicos, sociales y ambientales significativos a estas áreas.

Palabras Clave: Turismo rural, tendencias demográficas, turismo sostenible, comunidades sólidas, crecimiento económico rural, sostenibilidad socio-económica, valores rurales.

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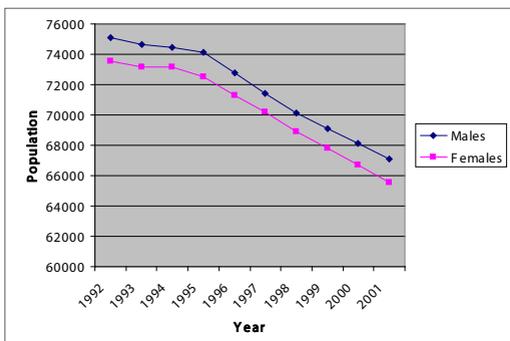
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1. Introduction

Across the world there is an ever increasing trend of human migration from rural areas and in particular small settlements to urban centres. A paper by Tozzi and Horan (2012) details the trend of human migration from rural areas to cities and the drain on human capital and associated socio economic stresses on rural regions and small towns, with a particular focus on trends in Europe and Australia.

Tozzi and Horan (2012) explain that ‘broad demographic trends across Italian and French regions reveal that many, which have historically featured a large number of small rural settlements and towns, have experienced depopulation at various times post World War Two, driven by migration to larger urban centres. This has been due to the declining viability of traditional agricultural activities and a lack of alternative employment opportunities (Kneafsey, 2000; Philips, 2003, p 465) Furthermore, Tozzi and Horan (2012, p 465) describe a similar trend in Australia with small towns experiencing population stagnation or decline over the last several decades. Possible reasons for this decline are listed in Regional Victoria’s Trends and Prospects 2010 (McKenzie and Frieden, 2010, p 3) and include: ‘capital intensification of agriculture requiring fewer workers; rationalization of services into fewer, larger centres; increased personal mobility allowing people to access goods and services further away; and increasing economic and social attractiveness of urban lifestyles.’

Figure 1. Population of 18-30 years old in Umbria, Central Italy.

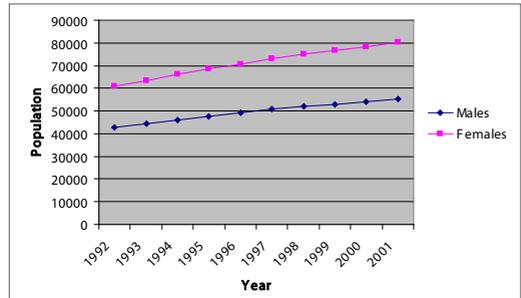


Source: Italian Institute of Statistics (2009)

Population loss from small towns is often most prevalent in the young adult age groups. An example of this trend in the region of Umbria in central Italy, a mountainous area containing many small towns and villages, is presented in Tozzi and Horan

(2012). Umbria experienced a 10 percent decline in the number of young people 18 to 30 years of age (as shown in Figure 1) up to the year 2001, compared with an increase of more than 30 percent in people over 70 years of age (refer to Figure 2).

Figure 2. Population of 70+ year olds in Umbria, Central Italy.



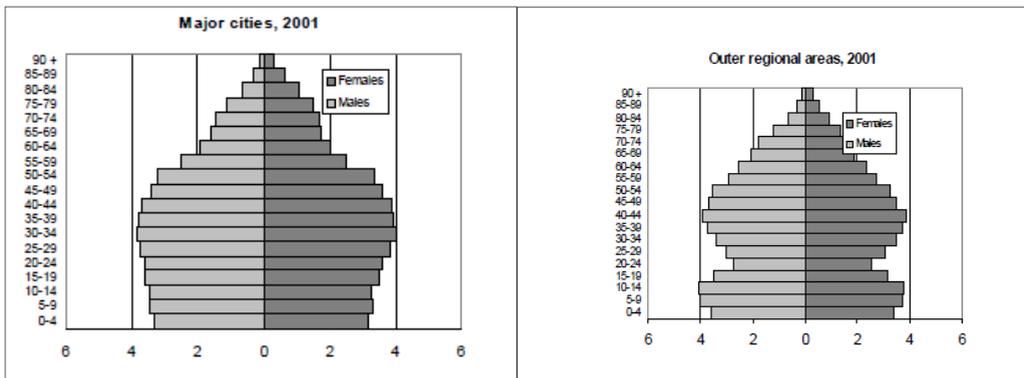
Source: Italian Institute of Statistics (2009)

A similar trend can be seen in Australia. This is demonstrated in Figure 3, which shows the hollowing out of the 20 to 34 year age profiles for outer regional areas in Australia. On the other hand, major cities within Australia have a much higher youth retention and thus proportion of young adults. This trend of youth migration out of rural settlements has serious implications to the sustainability of these townships. The loss of traditional services such as agriculture is under threat and a large reproductive potential, associated with young adult groups, is lost to rural populations (McKenzie and Frieden, 2010; Tozzi and Horan, 2012).

1.1. Impacts and Benefits of Rural Tourism

In some rural settlements, a decline in population and traditional services such as agriculture has led to the social and economic deterioration of these settlements. Tozzi and Horan (2012) describe how some small settlements in Europe have leveraged their unique characteristics through tourism and successful primary production industries unique to an area to create sustainable socio-economic townships. In Australia, with the decline of many traditional industries, tourism is becoming a major contributor to rural and regional economies.

Cities, particularly international gateway cities, are often the dominant destinations for many tourists. For example, Sydney, Australia’s largest city, is the country’s most visited tourist destination (Hunt and Prosser, 1998). However, often prominent

Figure 3. Population Pyramids for Broad Regions of Australia, 2001.

Source: (Australian Research Council Research Network in Spatially Integrated Social Science, 2007)

tourist attractions and landscapes are located outside major cities. Furthermore, many niche tourism markets such as agri-tourism, eco-tourism, wine tourism, health and wellness tourism are also centered in regional areas. For example, 72% of wellness tourism services in Australia are located in regional areas (Voigt et al., 2010).

The development of tourism surrounding these unique characteristics and attractions in rural areas provides major assets to these settlements through the potential to increase economic activity (Carlsen et al., 2008). Additionally, tourism can have other flow on effects on a township, such as the requirement to improve communication infrastructure and training facilities and the development and maintenance of transportation (Bolin and Greenwood, 1998).

When tourism is well planned and managed, rural areas can benefit not only economically but also socially and environmentally (Hunt and Prosser, 1998). The latest regional tourism strategy for regional Victoria, Australia (Tourism Victoria, 2009, p 17) suggests that social benefits may 'include generating community cohesiveness, facilitating regional pride and contributing to the revival of regional towns'. Furthermore, the strategy explains that 'tourism also promotes sustainability through communicating the value of natural and built heritage, providing the incentive for environmental improvements or rehabilitation of areas and raising awareness of environmental issues.' A summary of some potential economic, social and environmental benefits is outlined in Table 1.

The economic benefits of rural tourism can be seen in a new form of development, which has recently been put into practice and is reversing rural decline in some villages of Italy. The concept of 'albergo diffuso' is a simple but radical approach to revitalising impoverished and derelict villages.

As the Italian term suggests, it involves a hotel distributed or scattered throughout the village – the village becomes a hotel. Without changing the historic built environment of the village, individual homes and buildings are transformed using traditional materials.

The concept is the brain child of Daniele Kihlgren and company Sextantio Albergo Diffuso, which involves purchasing whole villages and two have already been developed. One village, Santo Stefano di Sessiano in the Abruzzo region, is a traditional hilltop village established in the middle ages. It once had a population of 3,000 which had dwindled to 100 at the turn of the century (Bain, 2013), when Kihlgren commenced purchasing property. In the Basilicata region of southern Italy the village of Sassi di Matera has also been transformed by Sextantio Albergo Diffuso. In some instances in this village, caves formerly used for habitation by cave dwellers or as pens for stock have been converted to expensive hotel accommodation.

The economic benefits for the village and region are significant. The emphasis on the use of traditional materials means that local builders and craftsmen are engaged in the renovations. The hospitality industry employs local people. Local agricultural produce is used in restaurants. Local food produce and craft are sold to tourists. Historical backdrops for staging and theatre provide employment as well and in turn bring more tourism to the district.

Rural tourism, whilst it has the potential to provide significant benefits to rural communities, if managed poorly can negatively impact on the socio-economic sustainability of townships. For example, the form of development applied by Sextantio Albergo Diffuso raises fundamental questions such as aesthetic integrity and even the *raison d'être* of the practice. These villages

Table 1. Potential Benefits of Regional Tourism

| Economic | Social | Environmental |
|---|--|--|
| Increased non-agricultural income | Use of visitor facilities for community purposes | Preservation of the natural landscape |
| Diversification of the region's economic base | Greater community cohesion | Increased interest in repairing environments |
| Improved employment opportunities | Opportunities for cultural exchange | Enhancement of the built environment |

Source: (Commonwealth Department of Tourism, 1994 referenced in Hunt and Prosser, 1998)

are being transformed far beyond any original expectations. Established as basic habitation for peasants over centuries, they now offer high level accommodation and cuisine for tourists. Fallen into decay and deserted by most or all of the inhabitants, now only wealthy tourists reside for one or two nights for leisure. The question can also be asked as to what type of experience is being formed. And can the risk of these developments becoming excessive caricatures of a now non-existent lifestyle be avoided. As this type of tourism development is very new, only time will tell if an appropriate balance can be maintained.

Rural tourism impacts on the environment through the consumption of goods and services. Ecologically, we are aware of the issues of urbanisation such as the use of non-renewable energy, the need for conserving resources such as water and the huge waste generation from a society and economy based on the production and consumption of goods and services. Nowadays, the rural townships enjoy similar infrastructure for energy, water and waste and living conditions to those in larger conurbations.

One activity which creates a major environmental impact is the production and consumption of food. However, only in rural areas can food produced in the region be consumed locally. In addition, many villages have access to small garden plots in the vicinity. Here produce can be grown including olives, grapes, fruit and vegetables. Consequently, it could be assumed that food transport impacts would be less. However, in regard to mass produced and distributed food, a limited range of food is available from the local mini-markets in rural areas and then residents as well as tourism suppliers must travel to the conventional supermarkets at the larger urban centres thus increasing the transport burden for those particular products.

In regard to waste, the generation of waste is a result of the production and consumption economy of our society which has also permeated the rural areas. All modern day products purchased from regional centres find their way to the remotest

settlement and the packaging and discards are disposed of into wheelie bins and dump master bins for collection as in the large cities. So waste is collected in the same manner as in the cities. It is trucked away and disposed of in landfill. The recycling of waste can be limited in rural areas, as the major recycling plants are usually located in larger regional centres.

Traffic congestion and parking problems are among the most common negative aspects of rural tourism reported. In fact transport in general contributes significantly to the environmental impact of rural tourism. As a society we have embraced the choices that mobility affords us. Transport now is a vital component of developed economies. While we rely on low environmental impact services such as IT and telecommunications as a vehicle for purchasing and booking rural tourism, these are but a catalyst for physically participating in rural tourism. Rural tourism employees can reside in regional centres and travel to work in the countryside. Conversely, employees living locally in the village or town travel to regional centres to purchase at department and specialty stores. They need to attend medical, legal, financial services. Visiting the library or municipal offices can require an extensive transport commitment.

So, the car has become an essential component of everyday village life and rural tourism. Fortunately, in most cases, the internal street and passageway system of rural villages and towns has remained intact. Largely due to their isolation, through traffic had no reason to pass through most villages, especially the hill-top villages, and so many villages escaped the carnage of having a main road constructed through their centres.

Even so, the car is shaping the geography of the village and rural town. Rural tourism and hospitality operators and employees own cars. However, parking availability is often restricted especially in the hilltop villages where there is little space for cars or even gardens. Also the land can be on such a slope that, to gain sufficient flat land for parking cars, parking areas are grafted around

Table 2. Potential Negative Impacts of Rural Tourism

| Economic | Socio-cultural | Environmental |
|---|--|--|
| Encourages dependence on industry prone to uncontrolled change | Creates feeling of invasion by tourists: overcrowding and traffic | Increases wear and tear on landscape features |
| Encourages part-time, seasonal or low grade employment and public service costs | Increases crime | Creates need for new development which may not be in keeping with local area |
| Incurs development | Reduction in local services e.g. food shops replaced by gift shops | Increases pollution (noise, visual, air, water, litter, traffic) |
| Leads to local land and house price inflation | Import of new cultural ideas-challenges existing way of life | Affects local biodiversity |

Source: (Page J and Connell, 2006)

the edge of the hilltop village cantilevered out over the edge of the village. Often these unsightly car parks provide the initial visible perspective on approach to an historic village.

Public transport connects rural areas and regional centres. However, as an area is more remote, the availability of these services becomes scarcer and the resourcing implications are too large for the smaller demand compared to large cities.

Other commonly reported negative impacts from rural tourism include rising house prices, disturbance and litter. A summary of some other negative impacts, which may result from rural tourism are provided in Table 2. It is important to keep in mind that the impact of rural tourism is diverse, just as in large urban centres, and there can be considerable variations in impact for different rural areas. It is a very complex issue and certainly an area which would benefit from data collection, industry surveys and further research.

In order for rural tourism to be beneficial it needs to be managed appropriately balancing the economic benefits with the conservation of the environment and the needs of the community. Tozzi and Horan (2012) discuss key factors which underpin the successful socio-economic turn around and prosperity of small settlements in Europe. Some of the critical factors discussed included a high level of local government support to develop and leverage locality, and high levels of both bonding and bridging social capital. Tozzi and Horan (2012) go on to present the 'Associations of the Most Beautiful Villages' as an example of an effective bridging platform that has facilitated the sustainable development across many culturally significant small settlements in Italy and France. The not-for-profit 'Association of the Most Beautiful Villages' of France was created in 1982, with the objective of both stimulating tourism and promoting sustainable development with respect to cultural

heritage and quality of life. The 'Associations of the Most Beautiful Villages' innovatively and creatively marketed small rural settlements in France and Italy, playing a pivotal role in developing a thriving tourist industry in these rural townships and enhancing the socio-economic sustainability of these communities.

However, Tozzi and Horan (2012) describe that there were also some tensions inherent in these small rural settlements competing for tourism in the international market place. The local population acknowledged the positives the presence of international tourists meant for the enhanced reputation of their villages, however they are also concerned that attracting too many international visitors would dilute and break down traditions and heritage (Gülümser et al., 2009).

Tozzi and Horan (2012) additionally show various Australian rural settlements where attempts at improving rural tourism and the socio-economic status of townships have not been successful. This was largely where the focus was on marketing a particular image of the town by a few motivated individuals without the backing of a strong and united community vision, and without the support of bonding and bridging social networks. More successful were those rural towns which emulated rural settlements in Europe focusing on their unique locality features, which have strong support across the community. They effectively leveraged their networks with local, state and federal governments, local and regional businesses and other rural towns and institutions to sustainably develop their communities – socially, environmentally and economically.

2. Case Studies

This section presents several case studies of rural communities in Europe and Australia,

which have successfully leveraged their unique characteristics to improve the socio-economic sustainability of their townships or districts. These include the district of Val d'Orcia and the township of San Gimignano in Siena Province, Italy and the townships of Castlemaine and Daylesford in Victoria, Australia. Common to these localities is the development of cultural identities and industries, which are a major draw card for tourists, and at the same time, provide significant economic support to rural settlements in their own right. The role of tourism in revitalizing and sustaining these locations is discussed along with other key success factors including: differentiating the area from other rural destinations, development of robust industries and services often unique to the area, and innovative community and government promotion of townships and districts.

There are many important factors, which can be measured to assess success in tourism. In this paper details on visitor numbers, which are a direct and objective means of assessing success in tourism (Dupeyras and MacCullum, 2013), and visitor expenditure are focused on and provided in this section. Overnight stays, which better reflect the impact of tourism on the economy than visitors' arrivals or day trips (Dupeyras and MacCullum, 2013) are included. A comparison of one year's figures with the next is used to convey growth or decline.

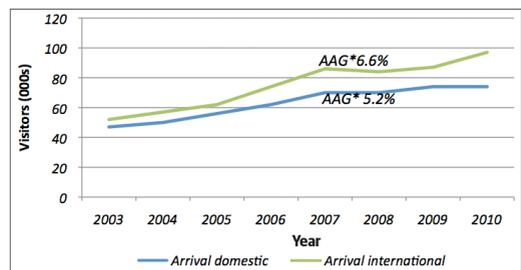
2.1. Siena Province, Central Italy

This section has principally been adapted from Tozzi and Horan (2012). Siena Province is in the region of Tuscany in central Italy. It has significant cultural, historic and economic value, as demonstrated by the four UNESCO world heritage recognised sites located here. Yet like Umbria and other agricultural regions of Italy, the province was subject to progressive depopulation and abandonment of agricultural activities in the 1970's, particularly by young people as they migrated to the industrial lowlands and regional plains of Tuscany (Alessandro Sorbello, 2010; Philips, 2003). However by 1999, Siena province was ranked 9th among 103 Italian provinces for quality of life (Pulselli et al., 2006), and in 2009 boasted the highest wine production in Tuscany, producing 35% of the region's total wine volume (99 million litres). Siena province also specialises in cheese making (pecorino di Pienza) and olive oil production, and had the highest number of registered agri-tourist farms in Tuscany in 2009: 1,034 out of a total of 4,046 (Italian Institute of Statistics, 2009).

The rise of the agri-tourism industry in Siena has seen an increase in international and domestic

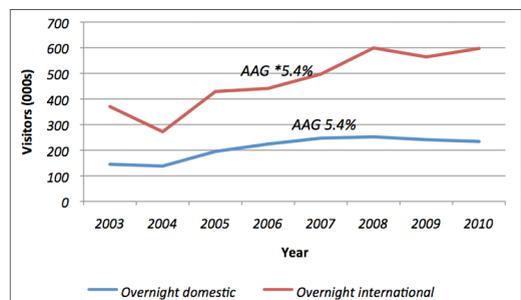
(Italian) visitors to agri-tourist farms in the province. Figure 4 shows that from 2003 to 2010 the average annual growth rate of arrivals or day trip visitors to agri-tourist destinations was 6.6% and 5.2% per annum for international and domestic visitors respectively. Figure 5 shows a much higher number of visitors, particularly international visitors staying overnight in these establishments. The number of overnight visitors also grew between 2003 and 2010, with a growth rate of 5.4% per annum for both domestic and international tourists.

Figure 4. Number of domestic (Italian) and international arrivals to agri-tourist farms in Siena, Italy from 2003 to 2010



Source: Osservatorio Nazionale del Turismo, 2009b
*AAG=average annual growth

Figure 5. Number of domestic (Italian) and international visitors staying overnight at agri-tourist farms in Siena, Italy from 2003 to 2010

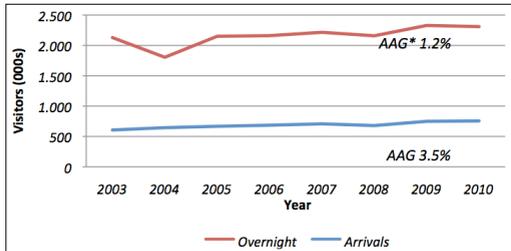


Source: Osservatorio Nazionale del Turismo, 2009b
*AAG=average annual growth

Figure 6 shows the number of domestic arrivals to all accommodation establishments in Siena between 2003 and 2010. The number of domestic arrivals grew in this period at a rate of 3.5% per annum. The growth in the number of overnight visitors was smaller at 1.2% per annum. These

growth rates were less than those for visitors to agri-tourist farms alone (refer to figures 4 and 5).

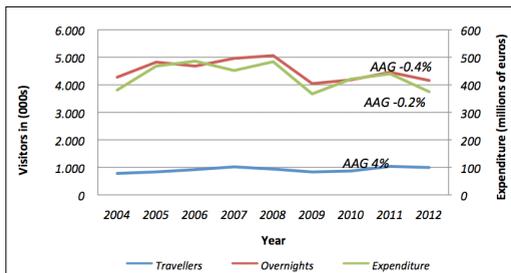
Figure 6. Number of domestic (Italian) arrivals and overnight visitors to all accommodation establishments in Siena, Italy



Source: Osservatorio Nazionale del Turismo, 2009b
*AAG=average annual growth

Similarly, the growth of international visitors to Siena was below that of visitors to agri tourist farms. In fact, figure 7 shows a small decrease in the growth rate of overnight international tourists of 0.4% per annum between 2004 and 2012. Figure 7 shows that expenditure by international tourists follows a similar trend to the number of overnight visitors. Hence, between 2004 and 2012 there was a small decrease in overnight expenditure of 0.2% per annum. The similarity in trends between overnight visitor numbers and overall expenditure points to the importance of attracting overnight visitors to an area, as they provide a much larger economic contribution than daytrip visitors.

Figure 7. Number of international travellers, overnight visitors and total expenditure for Siena, Italy between 2004 and 2013



Source: Osservatorio Nazionale del Turismo, 2009a
*AAG=average annual growth

The healthy growth of visitors to agri-tourism farms, despite a more moderate growth in domes-

tic visitors, and the recent plateau in growth of international tourists demanding accommodation units in the region, highlights the popularity of these farms. Therefore, the ability of these farms to attract visitors suggests they can provide great benefits to an area associated with all the flow on effects of a healthy tourism industry. The following case studies refer to some of the areas in the province, which have benefited from the development of agri-tourist farms.

2.2 Val d'Orcia

A 2011 study by Lorenzini investigated the role of culture in the socio-economic sustainability of the world heritage recognised Val d'Orcia district, a regional park located in Siena Province (shown in figure 8) of just under 67,000 hectares and a population of 13,500. It found that since the late 1980's the area had adopted a strategy of valorising culture-based goods and services linked to local history or traditional local customs. Civil organisations such as Cooperatives, Consortia and professional associations collaborated closely with public authorities and community groups to develop and manage territorial brands such as the DOP and DOC for local wines like Brunello, which is now a significant contributor to the local economy. Productive partnerships with organisations such as the not-for-profit 'Associations of the Most Beautiful Villages in Italy' has helped Val d'Orcia build an attractive image and leverage synergies with other culturally significant areas to creatively market their appeal at a global level.

The result of this approach was that instead of younger generations leaving the Val d'Orcia district, they stayed to carry on local traditions because of the national and in some cases international status achieved by certified products and brands. Producers now took great pride in the businesses they developed through their craft as part of the global market value chain. The markets' increasing interest in traditional local products and the link with a notable cultural area has contributed to a more positive image of farm life. The spread of agri-tourism, such as holiday farms, has helped diversify farmers' activities which has further attracted young people (Lorenzini, 2011).

Lorenzini suggests that Val d'Orcia has experienced a high rate of inter-sectoral integration with many links forming in the last twenty years between tourism, agriculture, handicrafts, the construction industry and services. Holiday and agri-tourist farms required qualified builders and furniture which stimulated local firms, craftsman found a market for their products in

visiting tourists, and agricultural products were served in the many restaurants, inns and wine bars which sprang up. A good proportion of the inputs to the tourism and export industries as well as community services, are supplied locally, thus building resilient socio-economic networks which foster a strong sense of local identity and self-sufficiency. The study concludes that this social capital has been essential in strengthening the authority of local institutions, such as the Val d'Orcia s.r.l. (the organisation that manages the area), which have promoted an integrated identity for Val d'Orcia and that, in turn, these institutions have strengthened Val d'Orcia's social capital. Nonetheless Val d'Orcia's success as a premium tourist destination has not been without its problems. The study found that a lack of cooperation between private enterprises, government and civic institutions has weakened participation in planning processes leading to variable quality standards in holiday farm development and rising real estate prices creating affordability issues for locals. These trends could impact the socio-economic sustainability of the region in the future (Lorenzini, 2011).

Figure 8. Location of Val d'Orcia and San Gimignano in Siena Province, Tuscany, Italy.



Source: Adapted from: http://en.wikipedia.org/wiki/File:Italy_provincial_location_map.svg

2.3. San Gimignano

San Gimignano (shown in figure 8) is another of the Siena Province world heritage listed sites which has a unique regional cultural character and identity that its citizens are passionate about. Philips (2003) studies San Gimignano in her book investigating what characterises 'sustainable place' as an example of a small village economy which has benefited from the growth in Europe of agri-tourism associated with traditional specialty food industries. Similar to other towns in the Siena province, San Gimignano was a peasant farming town prior to World War Two. However, in the 1940's and 50's, poor returns on crops and higher taxes forced peasants off the land. Over the last four decades, properties and surrounding small farms have been bought by wealthy northern Europeans (Swiss, Germans, English) and Italians who had become disillusioned with the quality of life in the industrial towns. By the 1980's the area attracted artists, craftsmen, academics and wine producers, bringing an influx of revenue and better farming methods. An exclusive wine variety, Vernaccia, was developed which earned the prestigious DOCG (Denominazione di Origine Controllata & Garantita) label in 1993. Strict building conservation regulations have ensured historic buildings in the town are sensitively renovated using traditional materials, protecting their heritage. These are primarily used to sell high quality luxury arts, crafts and food delicacies to tourists. Tourists are also attracted by the unique and attractive appearance of San Gimignano as a walled, hilltop conurbation, little changed from when it was built in 1100 – 1300, and surrounded by villas, farmhouses and a lush landscape of Cyprus pines, olive groves and vineyards (Philips, 2003).

However Philips notes there are signs that tourism is increasingly monopolising the township leading to detrimental effects which may threaten the ongoing social and economic health of the community. While tourist numbers have increased significantly (in 1993, 233,845 foreign and Italian tourists visited and stayed; by 1995 this number had increased to 381,116), the permanent population decreased from 4121 in 1971 to 1760 in 1996. This appears to be due to the increasing ownership of residential buildings by non-permanent residents – those who use the property as a holiday home or who rent it to tourists. Local residents, including those earning their living as producers and artisans, have come under pressure to sell their properties at the greatly inflated prices offered by newcomers, or are under threat from ever increasing rents demanded by landlords. While the existing town facilities do accommodate some public or community needs, such as a library and a

small hospital, the trend has been to move health, welfare, education and social services out of San Gimignano to larger centres, which acts to exclude some community members particularly the young and the elderly from the town. There are strong social bonds within local community groups that have formed around common concerns, however these can be narrowly self-interested, elitist and lack alignment with other groups and the general community. In addition, incentive structures and collaboration between local government and the community to support resource saving and environmental preservation is weak. This lack of balance between the economic benefits generated by tourism with other important social and environmental needs could ultimately erode the very regional character and identity that the tourism industry in San Gimignano has been founded on (Philips, 2003), therefore requiring a careful integrative planning approach.

2.4. Victoria, Australia

This section has principally been adapted from Horan et al. (2013). Victoria is located in the south east of Australia and is the country's smallest mainland state - roughly the size of the British Isles. The state's major city, Melbourne, continues to have a faster growing population than regional Victoria. However, there is a wealth of diverse regional areas and attractions, which can be leveraged through tourism and other industries to ensure a sustainable future for rural settlements. Daylesford and Castlemaine are two examples of rural towns in Victoria that have achieved this successfully.

2.5. Daylesford, Australia

The rural townships of Daylesford and Hepburn Springs are located in central Victoria just 90 minutes from Melbourne (refer to figure 9). The region contains 80 percent of Australia's natural mineral spring reserves. The Hepburn area is also renowned for its natural beauty and character, which reflects its early Victorian heritage when Swiss-Italian miners and other immigrants settled in the area (Hepburn Shire Council, 2013). The region has a history of agriculture, timber cutting, and goldmining. It has also been a popular tourism destination for over 130 years when people would travel to Daylesford and Hepburn Springs to "take the waters" (Voigt et al., 2010). An icon of the region is the Hepburn Bathhouse and Spa, which was developed in 1895, and caused the area to be known as the spa capital of Australia.

Figure 9. Location of Daylesford in Victoria, Australia



Source: Adapted from http://en.wikipedia.org/wiki/Daylesford,_Victoria

A decline in visitors and population in these townships occurred from the 1930s due to the popularity of other tourist destinations. At this time regional Australia was experiencing higher levels of unemployment in the traditional sectors of agriculture, forestry, mining and clothing manufacturing. By the 1970s these hardships showed with empty shops and rundown buildings in the region (Voigt et al., 2010).

In the 1980s, the unique character and attraction of the area and the tourist draw of the mineral springs prompted entrepreneurial development of high quality tourist and hospitality operations including the award winning Lake Resort. So began the revitalization of the township and overtime a diverse range of health and wellness practitioners were attracted to set up services in the area, cementing the town as a health destination. Tourism Victoria (2005), referenced in Voigt et al. (2010, p143) confirmed that 'the region has more than 85 different therapies available and a community of practitioners unlikely to be found anywhere in Australia'. Resident and visitor population expanded and services to meet the growing population increased. Agriculture also revived with a demand for locally grown produce to supply local businesses (Voigt et al., 2010) and today Tourism Victoria has identified food and wine as a strength of the area (Tourism Victoria, 2009). Daylesford has also developed a unique cultural identity and is known for its festivals and arts and culture (Tourism Victoria, 2009). Victoria's Regional Tourism Action Plan 2009-2012 (Tourism Victoria, 2009, p 27) has found 'in recent years sectors such as the arts, retailing, food, wine and health and community services are rapidly growing components in the local economy'. The population of the region continues to grow today with a growth rate of 0.5 percent (Department of Planning and Community Development, 2012). Several significant re-development

and improvements to the existing iconic bathhouse including most recently in 2008 has also helped promote economic growth in the area.

The economic importance of tourism to Daylesford and Hepburn Springs (Spa Country) is 14.3 percent of the local economy, which is well above the Australian benchmark of 3 percent, highlighting that tourism is important to the region's economy (Tourism Research Australia, 2011). The economic importance of tourism to the Daylesford and Hepburn Springs region was determined from the ratio of the region's total tourism expenditure or output to its total output. The benchmark for Australian tourism regions was derived by dividing the tourism output across all tourism regions by the total output across all tourism regions (Tourism Research Australia, 2011). In Daylesford and Hepburn Springs, tourism employment grew by 49.7 percent over the period 1997-1998 to 2002-2003, by far the largest growth in regional Victoria (Regional Tourism Research Centre, 2008). Since the 1990s the key economic sectors supporting Daylesford and Hepburn shifted from primary production to service activities supporting tourism according to the 2001 census (Gibson and Connell, 2011). Today the top two industries of employment in the Daylesford and Hepburn Springs area are cafes, restaurants and takeaway food services and accommodation both of which would be heavily supported by tourism (Australian Bureau of Statistics, 2011).

Table 3 shows the region received an estimated 485,000 domestic overnight visitors for the year ending December 2012. This was an increase of 15.2% from 2011 to 2012. The average annual growth of overnight domestic visitors from 2000 to 2012 is 0.6 % per annum. Visitor numbers since 2008 still increased however growth slowed slightly to 0.3% per annum. This is less than regional Victoria generally, which since 2008 had an increase in domestic overnight visitation of 0.9% per annum. Although visitor numbers for domestic overnight

tourists have remained fairly stable, with small growth over recent years, the figures are a marked increase on those for the previous two decades or so.

The region received an estimated 9,700 international overnight visitors for the year ending December 2012. Despite a decline in international overnight visitor numbers from 2011 to 2012, international overnight visitors to the region have grown at an average annual rate of 2.1% since 2008, compared to a decline of 0.4% per annum for regional Victoria overall.

The vast majority of tourist expenditure in Daylesford is derived from domestic tourists. Therefore, domestic tourist expenditure is a good measure of the performance of the tourism industry in the region. Table 4 shows that overnight expenditure from domestic visitors has increased from 2012 to 2013 by 3.9 %, however there has been a decline in the average annual visitor spending since 2008 of 2.2 % per annum. The daytrip visitor spending from 2012 to 2013 has had a marked decrease of -14.1%. The average annual growth rate of visitor spending since 2008 has increased by 2.9% per annum. This coincides with a healthy growth rate per annum in visitor numbers over this period (refer to Table 3). Total visitor spending since 2008 is slightly down due to a decrease in overnight spending. As early strong growth appears to be plateauing, a challenge for the area may be to attract more international and domestic overnight visitors. It is particularly important to increase overnight visitors, which provide a greater economic contribution than day trip visitors (Dupeyras and MacCullum, 2013).

The Victorian Government has recognized 'tourism as one of the most important contributors to the growth and character of the region' (Regional Tourism Research Centre, 2008). Consequently, it has supported the ongoing development and marketing of the region as an attractive tourist

Table 3. Domestic and international visitation to Daylesford and the Macedon Ranges

| Year Ending December | 2008 | 2011 | 2012 | AAG 00/12 | AAG 08/12 | % change 11/12 |
|---------------------------|------|------|------|------------|------------|----------------|
| Domestic | | | | | | |
| Overnight Visitors (000s) | 480 | 421 | 485 | +0.6% p.a. | +0.3%p.a. | +15.2% |
| Daytrip Visitors (000s) | 1365 | 1566 | 1677 | +1.0% p.a. | +5.3% p.a. | +7.1% |
| International | | | | | | |
| Overnight Visitors (000s) | 8.9 | 10.9 | 9.7 | +3.0% p.a. | +2.1 %p.a. | -10.8% |

(Adapted from Tourism Victoria, 2012a) *AAG=average annual growth

Table 4. Domestic tourism expenditure in Daylesford and the Macedon Ranges campaign region

| Year Ending December | 2008 | 2012 | 2013 | AAG 2008/2013 | Yearly Change 2012-2013 |
|-------------------------------------|------|------|------|------------------|----------------------------|
| Domestic | | | | | |
| Overnight Expenditure(million AUDs) | 164 | 141 | 147 | -2.2% p.a. | 3.9% |
| Daytrip Visitor Expenditure | 91 | 123 | 106 | 2.9%p.a. | -14.1% |
| Total Domestic expenditure | 255 | 264 | 253 | -0.2% p.a. | -4.4 |

(Source: Tourism Victoria, 2013a) *AAG=average annual growth Castlemaine, Australia

destination. In particular, it seeks to leverage the region's unique wellness and rejuvenation strengths. Daylesford has been picked as the hero destination in a new major interstate regional campaign. Launched in 2009, the 'Daylesford. Lead a Double Life' campaign focuses on positioning regional Victoria as a leading destination in spa and wellbeing (Tourism Victoria, 2009). As part of the campaign in 2013, a new destination iPhone app for the region, Discover Daylesford, was launched to provide visitors with accessible tourism information. Wellness tourism is one of the fastest growing tourism sectors (Voigt et al., 2010). Due to the depth of the mineral springs, world class resort and spa facilities and high number of wellness services in this the region it is likely it can increase its share of this market.

Castlemaine is a township located in the goldfields region of Victoria, Australia, 120 kms northwest of Melbourne (refer to figure 10). The town began as a gold rush boomtown after gold was first discovered in 1851 (Mt Alexander Shire Council, 2013). The area contained the richest shallow alluvial gold diggings the world had ever seen (Frost, 2002). A year after the discovery of Gold in 1851 there were 20,000 diggers working the alluvial beds (Mt Alexander Shire Council, 2013). At its height it was briefly larger than Melbourne, as the city's population moved to Castlemaine to seek for gold. The alluvial gold soon began to peter out and as the area lacked the gold-rich quartz reefs of other centres such as Bendigo and Ballarat (The Age, 2008) underground mining never developed. Therefore, after the gold rush, there was not much development and as such the town has retained much of its early heritage dominated by civic and commercial buildings form the mid to late 19th century (Frost, 2002).

Following the gold rush the population declined, however the town did not decline drastically due in large to secondary industries at the time such as breweries, iron foundries and a woollen mill (The Age, 2008). Today Castlemaine still has a strong manufacturing industry some of which are endowed

from its mining past where many took the opportunity to locally supply the miners and their families with all their needs (Mt Alexander Shire Council, 2013). The ability of these businesses to adapt to the changing requirements of the community over the years has meant they are still going strong today. Some of the main manufacturers include small goods, foundries and carpet spinning mills (Mt Alexander Shire Council, 2013). Castlemaine is the business centre of Mt Alexander Shire and in addition to its manufacturing industry is well serviced by a vigorous retail sector and many wholesalers and artisans (Mt Alexander Shire Council, 2013). Unemployment is 3.2 percent, which is lower than regional Victoria's rate of 5.2 percent (i.d consulting Pty Ltd., 2013a). The population of the greater Castlemaine area today is 9112 (i.d consulting Pty Ltd., 2013b); this is an increase of 623 people since 2001. The Victorian population bulletin cited a 0.1 percent increase in population for the year ending 2011 (Department of Planning and Community Development, 2012). Therefore, in recent times the population is increasing, but slowly.

Figure 10. Location of Castlemaine in Victoria, Australia

Source: Adapted from http://en.wikipedia.org/wiki/Castlemaine,_Victoria

Castlemaine is renowned for its art and cultural scene. The Mt Alexander Shire describe the arts industry as the heart and soul of the region and list it as one of its key industries supporting the local economy (Mt Alexander Shire Council, 2013). Artists include world-renowned musical instrument makers, sculptors, furniture makers, glass blowers and authors. There are many galleries that show the local works and live performance from musicians, actors, singers and dancers are also prominent and often perform at historic venues such as the Theatre Royal in Castlemaine. This theatre was first established in gold rush times to provide entertainment for the miners and their families. Castlemaine is home to the oldest regional arts festival in Australia and attracts performers and audiences from around the country and internationally. In addition to its economic value, the arts industry provides important social benefits to the community. Artists have expressed how the many artistic hubs become vibrant gathering spaces for the community (Australian Centre for Moving Image, 2010)

Unsurprisingly, the art culture in Castlemaine has long been a major draw card for tourists, attracted both for the art itself and the vibrant atmosphere that surrounds it. In addition to the allure of its art, since the 1960s Castlemaine has developed as a heritage tourist destination with much of its appeal lying in its intact landscape (Frost, 2002). More recently it is developing a reputation as a fine food destination (Tourism Victoria, 2013b). Castlemaine has been described as having a thriving tourist industry (Cegielski et al., 2000) and the level of employment in retail trade and accommodation and food services is testament to this. Retail trade is one of the main industries of employment and accommodation and food services is the 5th highest industry of employment in the Castlemaine area (i.d consulting Pty Ltd., 2013a). Retail trade and accommodation and food services are the two industries likely to be supported greatly by tourism. For instance Tourism Victoria found cafes, restaurants and takeaway food services accounted for the largest share of direct tourism employment (27 percent), followed by retail trade (19 percent) and accommodation

Table 5. Domestic and international visitation to Goldfields region

| Year Ending December | 2008 | 2011 | 2012 | AAG 00/12 | AAG 08/12 | % change 11/12 |
|---------------------------|-------|-------|-------|------------|------------|----------------|
| Domestic | | | | | | |
| Overnight Visitors (000s) | 1,117 | 1,346 | 1,435 | -0.6% p.a. | +6.5% p.a. | +6.6% p.a. |
| Daytrip Visitors (000s) | 3186 | 3649 | 4024 | +0.3% p.a. | +6.0% p.a. | +10.3% |
| International | | | | | | |
| Overnight Visitors (000s) | 34.2 | 36.8 | 40.0 | 0.5 %p.a. | +4.0%p.a. | +8.9% |

(Adapted from Tourism Victoria, 2012c) *AAG=average annual growth

Table 6. Domestic tourism expenditure in the Goldfields campaign region

| Year Ending December | 2008 | 2012 | 2013 | AAG 2008/2013 | Yearly Change 2012-2013 |
|--------------------------------------|------|------|------|---------------|-------------------------|
| Domestic | | | | | |
| Overnight Expenditure (million AUDs) | 307 | 421 | 392 | +5.0% p.a. | -6.8% |
| Daytrip Visitor Expenditure | 315 | 421 | 455 | +7.6% p.a. | 8.2% |
| Total Domestic expenditure | 622 | 842 | 847 | +6.4%p.a. | 0.7% |

Source: Tourism Victoria, 2013a *AAG=average annual growth

(13 percent) (Tourism Victoria, 2012b). A study aimed at assisting communities to develop heritage tourism opportunities, found much of the economic contribution occurs through spending on meals and accommodation whilst staying in the region (Jones et al., 2007).

Table 5 shows there were an estimated 4.0 million domestic daytrip visitors to the Goldfields region in the year ending December 2012. The number of domestic daytrip visitors increased by 10.3% from 2011 to 2012. Since 2008, domestic overnight visitation to the region has grown at an average annual rate of 6.0%. The Goldfields region received an estimated 40,000 international overnight visitors for the year ending December 2012. This was an increase of 8.9% from 2011 to 2012. Since 2008, international overnight visitors to the region have grown at an average annual rate of 4.0%, compared to a decline of 0.4% per annum for regional Victoria generally.

As with Daylesford, the vast majority of tourist expenditure in Castlemaine is derived from domestic tourists. Therefore, domestic tourist expenditure is a good measure of the performance of the tourism industry in the region. Table 6 shows that domestic visitor expenditure has also grown in the region. Since 2008, domestic overnight and daytrip expenditure in the region has grown at an average annual rate of 5.0% and 7.6% per annum. This has led to an annual average growth rate of 6.4 % for total domestic expenditure since 2008.

3. Conclusion

In recent times rural areas around the world have experienced sometimes dramatic decreases in population as people migrate to urban centres. Migration to urban centres is most prevalent in the young adult age groups, which affects traditional industries such as agriculture and associated services, and thus threatens the sustainability of these settlements. In some rural settlements, a decline in population and agriculture has led to their social and economic deterioration, as particularly visible in the here presented case studies.

On the other hand, rural areas can leverage unique characteristics, landscapes and attractions to develop vibrant tourism industries targeting new markets attracted to the particular features of many rural areas (Lane, 2009). Furthermore, rural areas have the features needed to create niche tourism markets such as agri-tourism, eco-tourism, wine tourism, adventure tourism and health and wellbeing tourism. With the decline of many traditional industries, the potential for tourism to provide increased economic activity

is particularly important to rural and regional economies. Tourism may also have other indirect effects on a township, such as the requirement to improve communication infrastructure and training facilities and the development and maintenance of transportation (Bolin and Greenwood, 1998). Tourism can also provide important social and environmental benefits to rural areas such as improving community pride and cohesion, providing opportunities for cultural exchange and increasing preservation and awareness of the natural environment and heritage (Hunt and Prosser, 1998).

Rural tourism, whilst it has the potential to provide significant benefits to rural communities, if managed poorly can negatively impact on the socio-economic sustainability of townships. Some of the most common negative aspects of rural tourism reported include traffic congestion, parking problems, rising house prices, disturbance and litter (Page J and Connell, 2006).. In order for rural tourism to be beneficial it needs to be managed appropriately balancing the economic benefits with the conservation of the environment and the needs of the community (Philips, 2003) The small settlements of Val d'Orcia and San Gimignano in Siena province of Italy have leveraged locality very effectively to develop a thriving economy based on tourism, however both need to ensure that the tourism industry is sustainable and does not lead to the social and ecological degradation of the local area. Daylesford and Castlemaine in Victoria, Australia are also thriving tourist destinations. In each of the four settlements vibrant and successful industries were created using the strengths of the local area. It was shown that the creation of successful industries often in conjunction with other unique characteristics or assets of an area are a major draw card for tourists. Subsequently, the benefit to the rural settlement is twofold with both the industry and the tourism generated as a result of the industry contributing to the socio-economic sustainability of the area (Horan et al., 2013). Other key factors for a successful tourist industry, which each of the case studies possessed included a unique identity and being renowned for this, development of robust industries and services often unique to the area, and innovative community and government promotion of the area.

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5TH EUROPEAN CONFERENCE ON INDUSTRIAL TOURISM

3TH CROSSROADS OF EUROPE

Los próximos días 17-18-19-20 de junio de 2014 se celebrará en la ciudad de Ferrol el *5º Congreso Europeo de Turismo Industrial* dentro del marco de la *3ª Edición del Crossroads of Europe*, organizado por la DG Empresa y Turismo Europea, la *Diputación de A Coruña*, CCI France y Cámara de Comercio e Industria de Toledo.

Las anteriores ediciones del Crossroads se desarrollaron en Pavía (Italia) y Toulouse (Francia), en el 2012 y 2013 respectivamente. Y las del Congreso Europeo de Turismo Industrial en Angers (Francia), Toledo (España), Turín (Italia) y São João de Madeira (Portugal), en 2006, 2008, 2010 y 2012.

El objetivo de este evento será destacar la importancia de las rutas culturales europeas en el desarrollo de una nueva forma de turismo, centrado en el turismo industrial y las industrias culturales (economía creativa e industrias).

Estará abierto a la participación de todos – asociaciones culturales y de turismo, organizaciones internacionales, autoridades regionales y nacionales, agentes de viaje y tour operadores, periodistas especializados y aquellos interesados en crear nuevas industrias en torno a la cultura y el turismo.

El Congreso se desarrollará bajo la temática central “**Identidad, Industria y Cultura**”.

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A summary assessment of the Agritourism Experience in Poland

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Abstract: This paper presents the nature, scale and types of agritourism as experienced in Poland where both in terms of occupation and social phenomenon it has been accepted as a new economic activity by the rural population. First, the author explains the origins of agritourism in Poland, which are different to the countries of Western Europe, revealing particularities in terminology. Next, the major achievements and issues regarding the development of agritourism in Poland are presented, both in practice and theory. The author states that overall on balance the experience is positive and that two development processes can be differentiated: exogenous and endogenous. The endogenous one poses a challenge for Polish agritourism in search of a new identity.

Key Words: rural tourism, agritourism, types of agritourism, evolution of agritourism, rural development, Eastern Europe; Poland

Un resumen de la evaluación de la experiencia de Agroturismo en Polonia

Resumen: Ese artículo presenta la escala y los tipos de agroturismo experimentados en Polonia, donde, tanto al nivel ocupacional como social, ha sido considerado como una nueva forma de actividad económica por la población rural. En primer lugar, el autor explica los orígenes del agroturismo en Polonia, que son diferentes a los de los países de Europa Occidental, y muestra sus particularidades en la terminología. A continuación, se muestran los principales logros y problemas del desarrollo del agroturismo en Polonia, tanto en la práctica como en la teoría. El autor afirma que, globalmente, la experiencia es positiva y que se pueden diferenciar dos procesos de desarrollo: exógeno y endógeno. El endógeno plantea un desafío para el agroturismo polaco en la búsqueda de una nueva identidad.

Palabras Clave: turismo rural, agroturismo, tipos de agroturismo, evolución de agro-turismo; desarrollo rural Europa del Este; Polonia

1. Introduction

The tourism experience may be viewed from different perspectives, *e.g.* sociological, physical, anthropological, economic, geographical and psychological, with an important link to the sustainability discussion. The process may be analysed not only from the point of view of the tourists, but also of tourism suppliers or “creators” (local stakeholders). Different authors disagree about the definition of tourism experience. Usually, it is treated as an element

of consumption (Prentice *et al.*, 1998; Urry, 1990) whose important aspects include visual impressions (looking, watching), but also taste, smell and other stimuli, all potentially contributing to “place authenticity”. This kind of experience, resulting from sensorial perception, is described in ways often contradicting each other (Cohen, 1979; MacCannell, 2002; Urry, 2007), but agreeing in the purpose of seeking high quality.

The direct provision of different forms of accommodation and attractions has occurred in Poland, increasing local tourism suppliers’ experience.

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The tourists' experiences, in form of impressions, sensations or knowledge gained based on their observation of reality and events, are also of concern to tourism creators. The issue of the tourism experience may then be approached from a planning and management perspective (e.g. Gannon, 1993; McGehee, 2007). It may also be studied in terms of quantitative and qualitative effects/impacts on host communities (Mathieson and Wall, 1982; Krippendorf, 1987) that result from a set of activities and social relations, as well as from the behaviour of tourism creators. The author uses the latter, qualitative, approach for analysing the development of agritourism in Poland.

The aim of the paper is to present the agritourism experience in Poland, both practically and conceptually, where both in terms of occupation and as a social phenomenon, it may be regarded as a new and relevant form of economic activity. This new type of tourism was developed 'from scratch', despite the continued tradition of leisure in the Polish countryside. The author presents not only the most important achievements and successes, but also critical issues in the development of agritourism in Poland, also discussing future challenges for this activity.

2. Literature review

Recreation in rural areas in Europe has a long tradition, as stressed by several authors, such as Schöppner (1988) or Oppermann (1996), and in Poland by Leszczycki (1938), Warszyńska and Jackowski (1979), and Dziegieć (1995). Agritourism as a particular component of rural tourism has been discussed by Clarke (1999), Nilsson (2002), and Phillip *et al.* (2010). Arguments for not treating agritourism as synonymous with rural tourism have been presented by many authors (e.g. Arnold and Staudacher, 1981; Deroi, 1991; Embacher, 1994).

Majewski and Lane (2001: 44) mention that the early appearance of agritourism as a form of rural tourism placed it in a prominent position. This thesis was confirmed by the bibliography of rural tourism, compiled by Lane in 1994 for the OECD, which showed that most studies referring to rural tourism focus on agritourism (Lane, 1994a). Similar observations were made by Wojciechowska (2003) when compiling the Polish bibliography of agritourism and rural tourism for the period, 1990-2002, also analysing the research undertaken from 1990-2007. Dividing that period into several sections allowed the author to grasp the most significant transformations in the Polish literature concerning rural tourism. They are worth a brief presentation.

In the first period - 1990-1992 - the authors of Polish publications primarily showed the possibilities of tourism development in rural areas, using examples from Western European countries. Also the practical guidebooks for the inhabitants of rural areas popularized these methods of stimulating the rural community as it was done in those countries (e.g. Wojciechowska, 1992).

In the next period - 1993-1995 - authors discussed the conditions, opportunities and issues of agritourism development in Poland, pointing to the advantages of agritourism as an economic activity, but with a mainly theoretical perspective. The terminology they used was vague, as the terms "agritourism" and "rural tourism" were applied interchangeably.

In 1996-1999, the scope of the issues studied was becoming considerably larger, likewise the number of researchers from different disciplines dealing with agritourism and increasingly interested in this phenomenon (agriculture, economics, geography, sociology). In that period, understanding gained in other disciplines was used in many academic publications. However, those presenting field research mostly contained descriptive information.

After 2000, more and more research integrating theory and practice has appeared where results concern both theory and practice. For local stakeholders' (practitioners) use, special methods have been developed for specific projects, such as village branding (Szalewska, 2000). Some publications presented after 2004 contained theoretical concepts and models, such as:

- a model of the rural tourism market (Bott-Alama, 2004),
- a model of agritourism development effects (Wojciechowska, 2006),
- agritourism farm economics and the relations between agricultural production and agritourism (Sznajder and Przezbórska, 2006),
- the idea of tourist function development levels in rural areas in Poland (Durydiwka, 2007),
- types of agritourism farms and their spatial differentiation in Poland; profiles of agritourism farm owners (Wojciechowska, 2007a),
- defining the terms and terminology system regarding rural and agritourism (Majewski, 2005, Wojciechowska, 2007b).

In 2010 several publications presented the achievements of Polish agritourism over a twenty-year period, but many critical remarks could also be found (e.g. Bednarek-Szczepeńska, 2011; Wojciechowska, 2011).

European Union programs additionally conditioned the development of the Polish literature

on the subject: national reports presented the conditions of Polish agritourism development, and other publications, directed at more practical approaches, like guidebooks, catalogues, maps, *etc.* also appeared. The programs furthermore enabled many practitioners and academics to study the development of agritourism in other countries, not only through seminars, exchange of publications and workshop materials, but also directly through research trips.

In conclusion, it must be stressed that the range of issues discussed is wide and has visibly changed over time in the Polish academic literature. Initially, the focus was on general, conceptual issues, such as general development opportunities and directions, often in the context of the Western European experience. Next, attention was redirected to the consequences of agritourism development, presented through local examples, which in turn became the basis for creating models and theoretical concepts. Such changes are typical of recent research areas and must be taken into account when reflecting on the future of agritourism in particular destination contexts.

3. Methodology

This paper is the distillation of the author's research undertaken on agritourism development over many years, starting from 1990, initially on the subject of stimulating local communities in the rural *gminas*/communes of central Poland by means of tourism. Gradually, the range of issues studied widened and a large quantity of statistical data has been collected, permitting a better understanding of the phenomenon and its evolution in this country. This data studied the dimension and evolution of agritourism nationwide and in individual regions, as well as opinions of stakeholders' regarding their motivations to get involved with agritourism, methods applied and results of this development. Surveys focused on the opinions of the inhabitants of rural areas, tourists arriving in the countryside, the people running agritourism farms and those involved in agritourism associations. This long-lasting research, enriched by field observation and literature review, as well as by participation in regional, national and international research projects, has resulted in a document, published in 2009, bringing together all aspects of Polish agritourism (Wojciechowska, 2009).

This paper contains selected parts of the last mentioned document, as well as new reflections on opportunities, critical issues and future challenges for agritourism in Poland. It is divided into four sections. The first explains the origins of agritourism

in Poland, which are different from West European countries, and also presents differences in terminology. The second part concerns the most important achievements and critical issues in agritourism development in practice, while the third part concerns theory. The fourth presents the challenges that must be faced yielding a new identity of agritourism in Poland.

4. The specificity of Polish agritourism origins and definitional issues

Tourism in rural areas in Poland has a long tradition. The first travellers to the countryside, before the end of the 19th century, were from the small intellectual and financial elite living in cities who spent their leisure time mainly at palaces, manor-estates or spas. As a result of urbanization in the 19th century, the number of city dwellers taking recreational and health-improving trips increased. It was for them that accommodation started to be 'arranged' in the countryside, followed by the development of compact summer resort complexes (Kulczycki, 1977).

In the interwar period, when Poland had regained independence, rapid development and a spatial concentration of summer tourism occurred, with a clear distinction into summer resorts built close to large cities, and those appearing far away from urban centres at attractive locations, *i.e.* in the mountains and on the coast. At that time, the idea of the development of "summer tourism" was conceived, within which rural residents were being prepared to receive tourists. The institutions responsible for the organization of such activities were local and national administrative bodies. It was also the beginnings of research (including statistical) into summer tourism. Research terminology included the concept of "summer holiday tourism", the expression coming from "summer holiday-makers" - participants of this type of recreation (Leszczycki, 1938; Warszyńska and Jackowski, 1979).

The socio-political system established after World War II had an influence on tourism development in rural areas. The pre-war tradition of receiving holiday-makers was regarded as a private business, which was, in fact, contradicting the 'mandatory ideology'. In the first years after World War II, trips to the countryside were limited, and in some areas the recreational function disappeared altogether. This was observable in the rural-urban fringe of large cities where summer resort settlements were being increasingly inhabited by new permanent residents. In the late 1950's, the idea of summer resorts in rural areas was re-activated, but it remained under state control

which actually hampered development and led to the appearance (especially in the 1980's) of the so-called 'accommodation black market', offering mainly accommodation to tourists. Tourism in rural areas was, at that stage, mostly centred in the holiday resorts belonging to state enterprises, as well as in urban inhabitants' second homes on their private plots of land. Various authors then started to discuss tourism in rural areas, mostly concerning second homes (Liszewski, 1987; Matczak, 1985).

The year 1989 was the beginning of economic and political transformation in Poland. Adopting the rules of the market economy resulted in many recreational facilities changing ownership, as well as in substantial changes of the way they were administered and developed. At the same time, opportunities for using foreign funding appeared which permitted new ways of stimulating rural areas through investment in tourism. Changes in the recreation style of tourists, who were looking for opportunities to enjoy a more individual, active and cognitively enriching recreation, were also observed. Following the example of Western Europe, associations, commune (*gmina*) 'unions' and foundations interested in tourism development appeared. Numerous brochures, catalogues and guides for the organizers (stakeholders) of tourism in rural areas were published. Simultaneously, many socially adverse phenomena, such as economic recession, the marginalization of agriculture as a means of supporting rural populations and impoverishment in rural areas were also found. Similar to Western countries, agritourism was identified as an opportunity to improve the declining situation of the agricultural sector and to offer an alternative source of income to farmers as well as a cheap and appealing type of recreation to tourists.

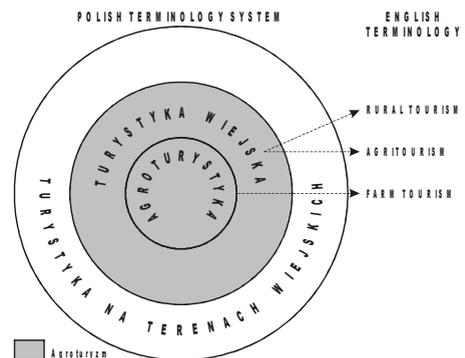
Agritourism – both as a term and a recognized tourism phenomenon – appeared in Poland at the time of the political-economic transformation. The idea of agritourism was "officially introduced" to the Polish countryside in 1991 by state institutions, mainly farming consultancy bodies, which started cooperation with similar institutions abroad. They first trained their own personnel, and then started to encourage and educate the rural populations to invest in agritourism. The campaign popularizing agritourism as a rural development tool was taken up by commune (*gmina*) councils and relevant ministries. They supported the development of agritourism (e.g. organizing courses for farmers), organizationally (e.g. counselling services) and legally (sanctioning farmers' exemption from income tax when letting up to five rooms).

It should be acknowledged that the introduction of agritourism in Poland, in the actual format, was institutional, thus continuing the traditional approach

to recreation in the countryside. The term, however, is quite new (derived from German), and signifies the method of generating tourism on farms, as popular in several West European countries. In Poland, it was developed "from scratch" (as referred above), when considering the skills and social experiences (with tourists) of rural inhabitants at that time. They had to learn the rules of agritourism, above all to understand that the innovation of agritourism lies in the readiness of a farmer's family to receive tourists at their home and to offer them an interesting program based on farming, the attractions of the countryside, and the local community's system of values. They had to see that this form of tourism takes place in conditions of a market economy, which means in a competitive context from both nearby and other regions. They had to learn to organize agritourism, earn money from it and cooperate with others in order to develop it.

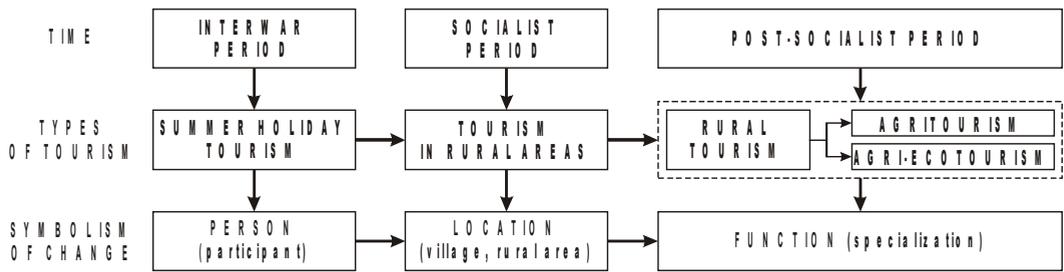
As mentioned above, the term *agroturystyka* (agritourism) in Poland was taken from foreign terminology. Initially, practitioners were unwilling to accept it, preferring native terms referring to recreation in rural areas. They often used old terminology, even from the interwar period, to refer to the newly generated tourism. Perhaps it was a way to get accustomed to something which was new, unfamiliar and came from outside. Various terms were used and understood quite freely both by practitioners and by scholars, until the mid-1990's. However, the semantic range of the term "agritourism", as well as other similar terms, was gradually established in the Polish academic literature. The set of terms is arranged hierarchically in Figure 1 to clarify the integration and connections between the mostly used concepts.

Figure 1. The relation between Polish and English terms defining tourism in rural areas



Source: developed and modified from Wojciechowska (2007b)

Figure 2. Evolution of Polish terms defining tourism in rural areas



The term with the narrowest semantic range is “*agroturystyka*” (agritourism). From the demand perspective, it is defined in Polish literature as a tourist’s stay on a farm, while from the supply perspective – as a tourist enterprise run by a family on their own farm. Thus, this term corresponds to the English term *farm tourism*¹. The Polish term “*turystyka wiejska*” corresponds to two terms used in the English literature: *rural tourism* and *agritourism*. It refers to tourism and leisure stays in the countryside, e.g. in former agricultural buildings or at other facilities such as guest-houses, private rooms to let, etc., but still in areas shaped by agriculture.

The term “*turystyka na terenach wiejskich*” (tourism in rural areas) seems to be the creation of Polish academics, who consider it as having a wider semantic because it refers to areas defined as “rural” in the Polish legislation, quite distinct areas², where tourism may be well-developed (recreation resorts, specialist recreation centres, complexes of second homes), and also those where nature dominates (e.g. marshes, lakes, forests, national parks). Similarly, the Polish concept of “*agroturyzm*” should be considered as a product of Polish academia and understood as including both “*agroturystyka*” and “*turystyka wiejska*”. The author believes that *agroturyzm* is a term that theoretically comprises all the issues referring to the spatial and temporal aspects of tourism related to the countryside, including its link to agriculture (Wojciechowska, 2009).

Compared to the English terms, the Polish terminology model has a distinct individuality. Another approach to the problem of terminology can be observed in the Russian literature, where researchers stress that they are just starting their studies, regarding both – practice and theory. The literature contains English terms, e.g. *rural tourism*, and their equivalents in Russian (Birzakov, 2005). The authors of definitions quote English or German authors (Birzakov, 2005; Klitsunova, 2004), but there are also numerous definitions by Russian

researchers. For example, Bulgakova defines *rural tourism* (*sielski turizm*) as follows: a particular type of tourism, comprising organized and unorganized forms of recreation at a rural destination for the purpose of coming closer to nature, learning about the rural style of life, and the traditions of running a farmstead – on a professional and amateur level (Bulgakova, 2003: 314). A slightly different definition is offered by Skoblikova, who claims that *rural tourism* (*sielski turizm*), also referred to as *agroturizm* or *agroekoturizm*, is a form of tourism in a rural area, where tourists live the local style of life while staying at farms and in villages (Skoblikova, 2005: 47). Many Russian academics look at rural tourism and agritourism from the perspective of natural assets and nature protection (Panov, 2003; Drozdov, 2003; Mazurov, 2004; Starcieva, 2004), and treat the terms discussed as constituents of the ecotourism concept, thereby making rural, nature and ecotourism overlapping concepts.

An analysis of the terminology system used in Poland shows a continuous evolution of terms and their semantic ranges. Majewski and Lane claim that rural tourism is a constantly changing and developing; not a static concept (Majewski and Lane, 2001: 32), in fact like many others. This observation applies to the other terms discussed here as well. The evolution of the Polish terms and their semantic ranges from the time after the war until the present day are shown in Figure 2.

The diagram shows that in the interwar period, the terms defining tourism in rural areas focused on their participants (holiday-makers), in the next period on the place of recreation (countryside), and nowadays mainly refer to its function, or even specialization. Terms like ‘agritourism’, ‘ecotourism’, ‘alternative tourism’ or ‘sustainable tourism’ in particular, point to special tourism activities in rural areas, which may be more or less associated with farming, with nature tourism or other more specialist pursuits, as actually identified as a trend for the global rural tourism phenomenon (Lane, 2009).

In conclusion, it must be stressed that agritourism in Poland turned out to be a new form of tourism, for its participants (demand), organizers (supply) and the superstructure, as well. It was introduced institutionally and based on the experience of other countries, associated with the hope of it serving as a rural development tool. The term defining it has been accepted by practitioners, scholars and politicians alike, and belongs to the evolutionary hierarchical system of terms referring to tourism in rural areas.

5. Major achievements and issues of agritourism development in Poland based on actual experience

The achievements of Polish agritourism are numerous and varied, as briefly presented in Table 1 and discussed in this section. On a practical level, they should be considered within particular demand and supply dynamics. In the first case, the achievement is the creation of a new form of recreation for tourists, permitting accommodation on farms and farm visits. As far as supply is concerned, the main achievement is that inhabitants of rural areas have gained an additional and sometimes alternative source of income and a new occupation.

As a result of the popularization of agritourism, other organisations generating and supporting its development appeared. They are mostly agritourism associations, which together with the Polish Federation of Rural Tourism (PFTW) form an agritourism self-governing body which deals with legal aspects and lobbies for agritourism development. The Federation's achievement was the establishment of categories of rural accommodation in 1997. In 2012, the rules of categorization were changed on the basis of experience in Poland. Moreover, the Federation promotes agritourism on

the www.agroturystyka.pl network and is a member of the European rural tourism accommodation association *EUROGITES* since 1997.

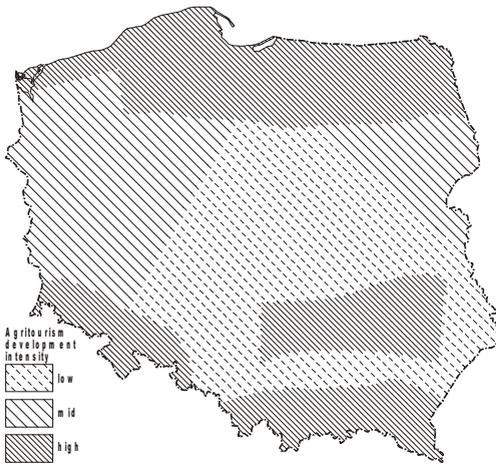
The quantitative effects may be measured by the scale and evolution of the accommodation facilities in the country. The first comprehensive evaluation of agritourism development in Poland was undertaken in 1996 and an inventory showed that there were 1952 farms receiving tourists, offering 15,653 bed places (Raport o stanie wiejskiej bazy noclegowej w Polsce, 1997). Since then, the number has increased, however difficult the identification of the exact number of agritourism facilities. From the very beginning the number has fluctuated. During many years, many agritourism farms have disappeared, but many new ones have opened, too. This fluctuation is not always taken into account in the statistics, therefore these are only estimates. In 2007, there were over 87,000 bed places in 8,800 agritourism facilities (Klembowska and Nowaczyk, 2008: 118-122). According to the Institute of Tourism, in 2009 there was a decrease in the number of facilities to 5,473, and in the number of bed places to 57,100 (www.intur.com.pl). However, in 2010, the Central Statistical Office registered 7,000 agritourism facilities with 82,700 bed-places. They were found in 55% of the total Polish communes (*gminas*), as single or combined units (Bednarek-Szczepańska, 2011: 261). Some villages show a compact and integrated concentration of agritourism farms. They are distributed in certain zones of the country - the mountains (in the south), uplands (south-east) and a section of the lake district including the coastal lowland (in the north) (Figure 3). Thus, they are located above all in tourism zones rich in natural and landscape attractions (the north and the south of the country), and much less in the farming belt of the lowlands in central Poland.

Table 1. Major achievements and critical issues in the development of Polish agritourism

| Achievements | Critical Issues |
|--|--|
| <ul style="list-style-type: none"> – encouraging the rural population to find a new source of income and occupation; – creating a new form of leisure; – creating organisations which can generate and enhance development; – creating legal, administrative and organizational development mechanisms; – establishing a clear positive role for the multifunctional development of villages and farms. | <ul style="list-style-type: none"> – the ephemeral character or inefficiency of development-generating rural tourism activity, insufficient understanding of innovation as a constant challenge; – overlapping activities and competences of pro-development institutions; a lack of integration and weak position) of agritourism self-governing bodies; – weakness and inconsistency of legal, administrative and organizational development mechanisms. |

Source: developed and modified from Wojciechowska (2011)

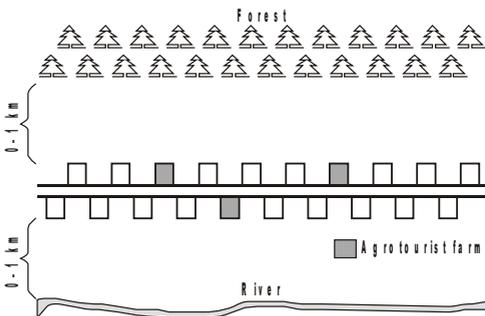
Figure 3. The geographical variation of agritourism development intensity in Poland



Source: developed and modified from Wojciechowska (2009)

The author studied the precise location of agritourist farms, *i.e.* their location within the settlement system and natural environment. The studies were conducted along the Odra River valley and other landscape zones of the country (lowlands, uplands and mountains). They enabled the author to construct a model of their location in the geographical environment, permitting a simultaneous analysis of the intensity of agritourism development in different parts of the country. The main elements of this model are the countryside, the forest and the water.

Figure 4. The location model of Polish agritourist farms



Source: Wojciechowska (2009)

As visible in Figure 4, agritourist farms are usually situated in a village, close to or away from its centre, within a short distance from the neighbours (several dozen meters). Outside the village, in the hamlets, there are few agritourist farms. The main assets of such a farm are its attractive natural surroundings. It is best when the distance from the farm to a water reservoir and forest does not exceed one kilometer. A river, lake or pond give the tourists an opportunity to swim and fish, being significant assets of the recreational offer, similar to forests of different sizes, mainly used for hiking and nature observation. In this model, the location features resulting from the natural conditions in the nearest surroundings are much more important than the settlement features, determining their tourist attractiveness. According to the agritourist farms owners, such elements as nature, forest, water or historical monuments significantly increase the chances for their success (*e.g.* Wojciechowska, 2000; Wojciechowska *et al.*, 2006).

Agritourism farms mainly offer guest rooms (about 76% of the total offer) and sometimes holiday flats and campsites (12% each). Farms generally offer up to five guest rooms, which are free from income taxes (77%). It contrasts with what is offered in many other European countries, where the main offer is holiday flats/apartments (Bott-Alama, 2004: 56; Sznajder and Przezbórska, 2006: 148). The Polish reality results from the fact that at the time of introducing agritourism, it was mostly rooms that were let, being less costly than investing in fully equipped holiday apartments. Another tendency is that in most cases the offer consists of accommodation only (45-55%), followed by an offer of accommodation + board (20-30%). The full offer, consisting of accommodation + board + attractions constitutes 15-20% of all offers (Wojciechowska, 2009).

Currently, given the tourist functions that an agritourist farm may perform, the most popular is the general recreation offer. It usually features some attractions, like having a barbecue, mushroom picking, cycling or sunbathing. It is followed by a specialized recreation offer, which usually features horse riding (for recreational, sporting or rehabilitation purposes), as well as fishing in natural or fish breeding water reservoirs. This particular offer contains other attractions as well, connected with winter sports, especially in the mountainous regions (*e.g.* skiing or tobogganing). The third in line is the health-oriented offer, quite broadly understood, because the very fact that the hosts serve meals cooked from their own agricultural products is promoted by them as the health function. Other

attractions include eating dietetic or vegetarian food, having the possibility to sleep on hay in a barn, or being engaged in farm work. The least frequent offers are those related to specialized services, such as the possibility to do recreational gymnastics, having massages or rehabilitation training. Finally, we have the educational and entertainment offer, both of which occur at similar frequency. The former one is connected with running “green schools”, organizing school lessons for children and teenagers, or classes (also for adults) teaching them new or rare skills (*e.g.* baking home-made bread or glass painting). This particular offer is based on the different skills and talents of the hosts. Tourists who book their stay at such farmsteads even one year in advance, are generally attracted by the entertainment offer, which is particularly popular among groups of friends who want to spend some time having fun together. This offer does not always require a particular program for the guests, but rather an appropriate preparation of the facility (*e.g.* dining rooms or food provisions).

Summing up this part of the article, we should point out that agritourism offers differ according to the natural and cultural attractions of a given region, rather than the skills or licences held by agritourism farm owners or members of their families. The agritourism offer is based more on the elements of rural life, *i.e.* on the elements of the surrounding countryside, its culture, nature and other attractions, than on agriculture.

It is worth mentioning that for 20 years the agritourism accommodation infrastructure has constituted 3-4% of the overall number of accommodation facilities in Poland (Bednarek-Szczepańska, 2011: 265; Wojciechowska, 2009: 115). During the summer holiday season, over 80,000 bed places on agritourism farms provide the potential for about five million person-days³, as well as being a source of direct income for about 9,000 families (8,900 facilities in 2011). In reality, bed-places on agritourism farms are used mostly in the summer holidays and during the rest of the year only in a percentage of about 20-30% (Bednarek-Szczepańska, 2011; Wojciechowska, 2009). On a national scale, these figures may not seem very impressive, and more specific studies may simply show that over the period of 20 years only some individuals have been successful. However, the author is convinced that this does not diminish the significance of agritourism in the multi-functional development of individual villages and farms. Careful and rational introduction of agritourism in the rural space may contribute to many positive changes, both in the physical form of the local settlements, in setting

into value certain local agriculture products and cultural assets and in widening the inhabitants' horizons and “opening” their mentality. In the light of research undertaken on agritourism in Poland, farm owners see the following positive changes resulting from the activity: possibility of learning and broadening horizons, learning of foreign languages, meeting new friends through the activity, better relationships within the own families (Bott-Alama, 2004; Szalewska, 2000; Połomski, 2010; Wojciechowska, 2009).

However, there are also many critical issues connected with the practical side of agritourism. Table 1 presents them divided into three groups. The first one concerns the ephemeral character of activities (both owners of agritourism farms, and associations), as well as their invisibility in the tourism market and lack of understanding of innovation as a constant challenge. The majority of regional and local associations were founded in the 1990's. In 2010, only 10% of them had been operating for over 15 years (Wojciechowska, 2009: 95). Most function for a short period of time – about 5 years. This means that many agritourism associations founded in the 1990's do not exist any more. The position of the Federation, which is the main organization, is weakening. The number of member associations seemingly stays the same (c.40-45), but they are not the same associations continuing the same activities (www.agroturystyka.pl). Two or three times as many associations do not belong to the Federation, and operate alongside, eventually duplicating efforts and clearly resulting in a sub-optimal coordination of agritourism in Poland. Moreover, the weakness and inconsistency of the legal, administrative and organizational mechanisms contributes to an unnecessary overlapping of activities and competences between those involved in or supporting agritourism development. Some are becoming dangerously competitive with each other, creating more harm than opportunities for a successful and competitive agritourism development in the country.

In conclusion, it should be stressed that agritourism in Poland has developed spontaneously, although introduced by a top-down approach making use of available funding and copying concepts from other Western European countries. As a “new” form of tourism (in its actual shape), over a relatively short period of time (20 years), it has created both supply and demand, as well as achieved an established position within the national tourism system. Despite many problems accompanying agritourism development, overall the practical experience of agritourism should be regarded as positive, though still in constant adaptation and yet improvable.

Table 2. Major achievements and issues in research on Polish agritourism

| Achievements | Critical Issues |
|--|---|
| <ul style="list-style-type: none"> – conducting extensive research and analysis; – stimulating research in a variety of disciplines (e.g. agriculture, economics, sociology, geography, pedagogy); – establishing regularities in the cognitive process and creating theoretical models in various disciplines. | <ul style="list-style-type: none"> – poor methodological integration; – research progress is clearly rather quantitative; – difficulties concerning the comparability and repeatability of research results; – lacking consensus and constant terminological discussion which hampers the integration of theory; – ineffective integration of theory and practice. |

Source: developed and modified from Wojciechowska (2011)

6. Polish agritourism in academia

In the field of academia, agritourism achievements are both quantitative and qualitative. The first includes the constantly growing number of academic publications, conferences, seminars, research programmes, as well as centres or institutions, which include the word 'agritourism' in their titles. This reflects the broad study field of agritourism. Here, representatives of different disciplines are looking for answers to questions concerning agritourism from the point of view of their own academic fields. As a result, agritourism is studied in disciplines such as agriculture, economics, sociology and tourism geography (Table 2).

A qualitative achievement is the fact that there are an increasing number of studies which show how agritourism develops, having achieved some degree of maturity in their specific fields of research. The authors of these publications have formulated and developed a detailed methodology for agritourism studies. This process, however, has taken place differently in different disciplines. A literature review shows that researchers from different disciplines study agritourism practically independently of one another and in the terminology appropriate to a given discipline. An effect of such an approach is a poor integration of knowledge from different disciplines. Some conferences gather representatives of many disciplines in order to work out an interdisciplinary approach, and Polish agritourism symposia⁴ invite practitioners to take part in them. Despite these efforts, it must be said that the interdisciplinary approach is still underdeveloped. It is easy to notice the lack of research projects bringing together specialists from different fields to seek answers to the same questions. The interdisciplinary approach would make it possible to create a common platform for discussion among representatives of different disciplines involved in agritourism studies and would certainly benefit the development of the understanding of the phenomenon as well as the

preparation of a sound basis of action. During the 20 years of agritourism in Poland, no such platform has been formed.

Another issue concerning academic research in agritourism is the fact that progress in these studies is clearly mostly quantitative, although still typically not representative of the nationwide phenomenon. There are a multitude of publications and expert assessments, but the research results they contain are very modest, mostly of descriptive nature, often not representative and very rarely regarding the whole country (partly due to a lack of uniform and continuous statistical data). This leads to yet another issue, namely difficulties with the comparability of research results, both in time and space. The situation does not encourage researchers to repeat their work in order to analyse the changes taking place over time. On top of that, continuous terminological discussion regarding the term 'agritourism' in the diverse disciplinary fields works against theoretical integration. This in turn means poor integration of theory and practice. The number of studies is seemingly large, but if we look at the results, they are not very impressive. This is confirmed by the fact that there is little research concerning differences in demand in Poland, as regards the range, structure, features and trends of the changes which are so important for the practitioners, namely for strategically managing demand. Kastenholz (2004) made a similar observation for North Portugal.

Concluding, agritourism is a relatively new phenomenon in the Polish academic life, not to say a new research field. It is an example showing that practice may stimulate theoretical studies, as well as provide research fields and issues.

7. Seeking a new identity for Polish agritourism

The future development of Polish agritourism may follow two patterns. The first one may be called exogenous, and the other – the new or endogenous

approach. The former has lasted for about 15 years and was a somehow spontaneous reaction on typically external factors, such as:

- international cooperation structures challenging the country's integration,
- European Union aid or structural funds (for example the Programmes PHARE TOURIN and SAPARD)⁵.

This development was strongly inspired by the experiences of other countries. Exogenous factors played a major role at that time. Within the national space, this 'inspired' agritourism, *i.e.* agritourism farms and associations, appearing at different places like 'railway engines' running without a timetable, pulling other 'railway car' behind them and losing many on the way.

However, around 2005, when the aid programs came to an end, and the EU structural programs had yet to be introduced, new difficulties emerged in the development of agritourism. They were mostly connected with the increasing international competition in the tourism market, rural tourists' growing expectations, the need to provide a high quality offer, and the consequent financial expenditures both agritourism farms and associations need to face. These and other increasingly visible obstacles and challenges gave the most persevering and experienced actors in agritourism in Poland an impulse to seek a new development model.

Based on the past experience in the field and the recognition of the before-mentioned unsolved problems, reflected in much of the academic reflections, one may suggest that Polish agritourism has been looking for a new identity for at least five years and on different levels: organizational, social and spatial. The direction of this search is being set (*e.g.* during conferences) by the Polish 'Federation of Agritourism Association' which stresses the need to constantly adapt to a changing and challenging reality. The aim of the organization is to make the changes creative, oriented towards new ideas, most of all on the basis of endogenous resources.

This endogenous model is a challenge for Polish agritourism in the pursuit of its new identity and this involves finding answers to questions, which are currently concerning practitioners and academics alike, such as the questions regarding:

- 1) What kind of agritourism offer should be the target and how to differentiate this offer spatially? What to offer around large Polish cities, what in traditional villages or in tourism zones in rural areas? To what extent should the differentiation of the offer be spontaneous or follow a plan?
- 2) Should there be a differentiation within the agritourism activity regulations distinguishing

between agritourism as an additional source of income for farming families or as the main source of income (business) for families or individuals living in a rural area? If so, how?

- 3) How can the Polish Federation of Agritourism Associations change the image of Polish agritourism, so that the organization can coordinate its development?
- 4) What should be taken into account in the spatial planning of the Polish countryside as far as agritourism development is concerned?
- 5) To what extent can a local community decide on the scale of agritourism development on individual farms or on the tourism facilities in their village, to avoid damage to the spatial system, heritage, landscape, *etc.* of individual settlements?
- 6) How can this community face the phenomenon of 'becoming a part of the tourism attraction it offers', a phenomenon which has caused a number of the internal and external conflicts observed in Polish agritourism?

The last mentioned problem is highlighted by the sociologist Polomski, who describes the life of the residents of villages situated in protected nature areas (within the premises of the Bieszczadzki National Park). He uses the metaphor of the 'monkey and the open-air museum' for the phenomenon he studies, where villages stop being places of food production, lose their farming roles for the benefit of tourist functions, providing entertainment and fun, making tourists look at the residents like 'monkeys in an open-air museum' (Polomski, 2010: 129). Not all residents are happy with this role, not all believe such activities to be appropriate for them. The lack of choice of activity often results in migration, while staying in the village without getting involved in tourist services is often associated with being pushed to the brink of social life. It is an example of a conflict inside the local community, but also conflicts resulting from how such communities are perceived by other, especially the neighboring ones, must be taken into account. Descriptions of such delicate cases can also be found in Polish literature on social impacts of agritourism development in some cases.

In face of the above problems, it seems important to provide local communities with knowledge of the optimum and incontrovertible indicators of agritourism development, possibly in many aspects. The suggestion seems reasonable in the context of the spatial development of every village in a given region in Poland. It makes sense to give agritourism its place in the postulated vision of spatial rural development, including a dimension

of socio-economic development. The possibility of presenting the scale of agritourism development effects (its benefits and costs) should be very important for local communities, too. This knowledge on the possible negative side and limitations of agritourism may avoid disappointment caused by excessive hopes connected with tourism development. It also becomes possible to define the optimum number of agritourism farms for a given locality, which will enable the community to choose the form of development, *e.g.* as an agritourism village or rather with individual accommodation facilities belonging to a regional or national network. This statement may be confirmed by the case of the village of Ślasków Mały. It is located near Kielce city in Góry Świętokrzyskie Region (in the south-east of the country on the uplands). In the 1990's this village was announced as 'an exemplary agritourism village'. In 1999 it had 25 agritourism farms, while in 2010 – only 10. The large number of agritourism farms in a village, without any significant tourism assets resulted in social conflict (Wojciechowska, 2011: 71). By defining the limits of agritourism development, it will be possible to prevent its excessive growth in a given village. Uncontrolled and spontaneous development over a period of time is not favorable from the perspective of neither tourists nor inhabitants. Sharpley and Sharpley suggest that tourism and recreation play a pivotal role in debates concerning the extent to which rural areas should be developed or conserved (Sharpley and Sharpley, 1997). However, geographical space is a strictly limited resource (Urry, 2007: 73), in agritourism as well.

The questions above show that the time has come to review the present tight legal and organizational 'corset', as well as the development directions of Polish agritourism. It may be said that in the past 20 years, both practice and academic research have been focused on techniques supporting its development. Now, a reflection on how to better plan agritourism development is needed. The researchers' task should therefore be to help planning agritourism, trying to consider both the tendencies and forecasts of the tourism market and the socio-economic development context of the countryside and the specific territories and communities where agritourism is put into practice, aiming at sustainable tourism development benefitting all stakeholders involved (Saxena *et al.*, 2007; Kastenholtz, 2004). In this context, the establishment of rules and techniques for measuring and evaluating the effects of agritourism activity is also needed to assess its impacts and help recommend an optimum level of the activity

and to more successfully manage it within the overall rural development process.

8. Conclusions

The Polish agritourism is marked by very specific origins, shaped by a historical, political, economic, cultural and social context, a correspondingly particular course of development and own terminology system (Wojciechowska, 2009). Contrary to Western European countries, where agritourism has developed in a relatively organic evolutionary process, with development mainly caused by endogenous factors, in Poland it started in a rather 'revolutionary', abrupt way and was originally caused by exogenous factors, implying a series of difficulties and challenges many agritourism actors face nowadays. This approach is gradually changing to a more endogenous model of development, better linked to endogenous resources and competences and thereby, arguably, with an enhanced potential to further sustainable agritourism development in Poland (Saxena *et al.*, 2007). Considering the evolution of agritourism in Poland, despite the difficulties of systematically and rigorously assessing its scale, structure and patterns over time and despite "ups and downs" over time and some clearly negative examples observed (*e.g.* Polomski, 2010; Wojciechowska 2000, 2011), the activity has achieved a certain level of maturity, with the global balance of the agritourism experience in Poland, on both practical and academic levels, being positive.

The present challenge for Polish agritourism is the pursuit of a new identity, based on the before mentioned endogenous factors. This new agritourism development approach should, in fact, yield a more satisfactory development for all involved, produce higher levels of tourist satisfaction and agritourism competitiveness, while simultaneously setting into value endogenous assets, without jeopardizing natural nor cultural heritage nor social structures and identity of local communities, in short yielding sustainable rural tourism development (Garrod *et al.*, 2006; Kastenholtz, 2004; Saxena *et al.*, 2007). Whether benefits are possible, and whether the role of agritourism will be perceived positively, depends on those involved in organizing it. They decide how well they can use the positive opportunities given by agritourism, and to what extent they allow negative influences to intervene. For these people agritourism, like technology, cannot be good or bad in itself. What turns out to be the final effect in a given situation depends on the

skills of the agritourism provider and the ways it is exploited.

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Notes

- The hierarchy of terms in the English language literature was mentioned by Jansen-Verbeke (1990), who wrote that *rural tourism* has the widest semantic range and means 'all tourism in the countryside', while *agritourism* is its sub-term, because it concerns 'farming-related tourism'. The term of the narrowest semantic range, which is subordinate to the ones mentioned above, is *farm tourism*, which means 'tourist stays on farms'. The definition and forms of tourism in rural areas have also been discussed by Lane, 1994b; McGehee, 2007; Roberts and Hall 2001; Sharpley and Sharpley, 1997, and others.
- In Poland each area outside of a town/city is termed as "rural area", corresponding to about 96% of the country's territory.
- Person-days is a unit of measurement, which tells how many total days a tourists spent at the destination. Person-days corresponds to the product of the number of days of summer holiday and bed places on agritourism farms.

Example calculation: July – 31days and August – 31days, total: 62 days and the product: 62 (days) x 80,000 (bed places) = 4,960,000 ≈ 5,000,000 person-days.

⁴ They have been held since 1993, at first annually, and since 2001 every two years. In 2013 the fifteenth symposium was held.

⁵ PHARE - Poland and Hungary: Assistance Program for Restructuring the countries' Economies, created in 1989, as one of the three pre-accession instruments financed by the European Union to assist the applicant countries of Central and Eastern Europe in their preparations for joining the European Union. In Poland were three programmes (Tourin I, II, III) directed to the development of tourism (<http://ec.europa.eu/>).

SAPARD - Special Accession Programme for Agriculture and Rural Development, established in June 1999 by the Council of the European Union to help countries of Central and Eastern Europe deal with the problems of the structural adjustment in their agricultural sectors and rural areas (<http://ec.europa.eu/>).

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BARCELOS

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DO VINHO



Vinho, Património Cultural e Enoturismo em Barcelos e no Minho

Barcelos, Portugal

7 de 8 de Novembro de 2014

Simposio integrado nas Comemorações de *Barcelos: Cidade do Vinho 2014* e comemorativo do Dia Internacional do Enoturismo

Objectivos Gerais

- Reunir investigadores de distintas academias nacionais com o objectivo de discutir a importância da Vinha e do Vinho no Entre Douro e Minho, tendo em especial atenção o contributo do concelho de Barcelos na definição da actual Região Demarcada
- Analisar a temática da Herança Cultural e Patrimonial numa perspectiva interdisciplinar, reunindo contributos de Historiadores, Patrimoniólogos, Arqueólogos, Sociólogos, Enólogos, Arquitectos e Engenheiros
- Projectar contributos teóricos e práticos que possibilitem o reforço da dimensão Enoturística no Entre Douro e Minho

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Turismo rural pedagógico sob a perspectiva da multifuncionalidade da agricultura: experiências no sul do Brasil

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Abstract: Este artigo tem como objetivo apresentar alguns resultados de uma investigação científica, cujo principal objetivo consistiu em analisar as atividades de turismo rural pedagógico como prática educativa a ser desenvolvida em complemento ao ensino escolar, com base em duas experiências empíricas desenvolvidas no sul do Brasil: O Roteiro “Caminhos Rurais” de Porto Alegre (RS) e o Projeto de Turismo “Viva Ciranda”, em Joinville (SC). Metodologicamente, utilizou-se a revisão da literatura, a observação das atividades propostas e entrevistas semiestruturadas, realizadas com 11 agricultores, donos das propriedades e 22 professores, que visitaram essas propriedades. Conclui-se que o turismo rural pedagógico desempenha importante função socioeducativa, contribuindo para a aprendizagem das crianças e a valorização dos saberes e fazeres dos agricultores.

Key Words: Turismo rural pedagógico, desenvolvimento rural, atividades educativas, diversificação, multifuncionalidade.

Pedagogical rural tourism from the perspective of the multifunctionality of agriculture: experiences in southern Brazil

Resumen: This paper aims to present some results of scientific research, whose main objective consisted in analyzing the activities of pedagogical rural tourism as educational practice to be developed in addition to schooling, based on two empirical experiences developed in southern Brazil: the Tourism Route “Caminhos Rurais” of Porto Alegre (RS) and the Tourism Project “Viva Ciranda” in Joinville (SC). Methodologically, we used a literature review, the observation of the proposed activities and semi-structured interviews conducted with 11 farmers, owners of farm properties and 22 teachers who visited these properties. We conclude that pedagogical rural tourism plays an important socio-educational function, as contributing to children’s learning and setting into value of the farmers knowledge and practices.

Palabras Clave: Pedagogical rural tourism, rural development, educational activities, diversification, multifunctionality.

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1. Introdução

A partir de 1990 a temática do desenvolvimento rural tem sido foco de uma série de discussões no contexto acadêmico e político internacional. Questões como sustentabilidade ambiental, segurança alimentar, e as “novas” atividades agrícolas e não agrícolas ganham força nesse debate, contribuindo de modo significativo para uma melhor compreensão acerca das mudanças sociais, econômicas e culturais ocorridas nas áreas rurais.

Diante dessa conjuntura, o meio rural começa a ser visto não mais como um lugar atrasado e sem perspectivas, mas sim, como um espaço dinâmico e diversificado, profundamente marcado por relações de complementaridade com o urbano. De acordo com Graziano da Silva (2002), este “novo rural” já não pode mais ser pensado somente como um lugar que produz mercadorias agrícolas e oferece mão-de-obra.

Do mesmo modo, a agricultura também adquire uma nova dimensão, na medida em que passa a desempenhar novas funções. Ela se torna responsável pela disponibilidade e qualidade dos alimentos, pela conservação dos recursos naturais e preservação do patrimônio cultural, bem como pela reprodução socioeconômica das famílias rurais (Wanderley, 2003).

Compreendida como “todos os produtos, equipamentos e serviços criados por atividades agrícolas em benefício da economia e da sociedade em geral” (Losch, 2004: 340), a noção de multifuncionalidade da agricultura possibilita o reconhecimento de outras potencialidades do meio rural e da atividade agrícola.

Segundo Carneiro (2003), esse enfoque da multifuncionalidade da agricultura favorece a legitimação de formas de produção e de fontes de renda que, na maioria das vezes, permanecem alheias aos quadros analíticos de caráter hegemônico.

Como exemplo, cita-se o turismo rural pedagógico, caracterizado por um conjunto de atividades educativas realizadas no âmbito da propriedade rural que utiliza como recurso didático as atividades agrícolas e pecuárias e os recursos naturais e culturais ali existentes, com o intuito de facilitar a aprendizagem dos alunos, por meio da articulação entre teoria e prática (Klein, Troian e Souza, 2011).

Na análise de Ohe (2012), dentre os fatores que tem favorecido o surgimento e expansão desse fenômeno está a perda de hábitos alimentares saudáveis tradicionais. Como exemplos, cita-se a questão relacionada à origem dos alimentos, o aspecto cultural relacionado à alimentação e a valorização dos costumes da vida rural.

Nesses termos, o turismo rural pedagógico emerge como uma alternativa inovadora que reflete

as características do “novo rural”. Aspectos como educação, meio ambiente, agricultura familiar e integração econômica e social representam alguns elementos que envolvem esta temática.

Neste sentido, o presente artigo analisa as atividades de turismo rural pedagógico, enquanto prática educativa a ser desenvolvida em complemento ao ensino escolar. Para tal, na primeira seção, apresenta-se uma breve discussão em torno da noção de turismo rural pedagógico, tratando de evidenciar que a mesma integra, ao mesmo tempo, 4 áreas distintas do conhecimento: o turismo, a educação, o desenvolvimento rural e a agricultura, estando intimamente relacionado com a multifuncionalidade da agricultura e dos espaços rurais. A segunda seção dedica-se a apresentar os procedimentos metodológicos e na terceira seção discutem-se, à luz de referências bibliográficas, alguns resultados de investigação científica que teve como base empírica duas experiências desenvolvidas no sul do Brasil: o projeto “Viva Ciranda”, de Joinville (SC) e o Roteiro “Caminhos Rurais” de Porto Alegre (RS). Na quarta e última seções apresentam-se as considerações finais do artigo.

2. Turismo rural pedagógico: um conceito em construção

No contexto brasileiro, as discussões acerca desse tema iniciaram-se recentemente, sendo que a primeira definição elaborada é de 2005. Na ocasião, a Associação Brasileira de Turismo Rural em parceria com a Agência de Comunicações ECA Jr., Empresa Júnior da Universidade de São Paulo (USP), juntaram-se para executar um projeto piloto que tinha como objetivo criar um roteiro visando a promoção e difusão das propriedades rurais enquadradas no conceito de turismo rural pedagógico (Abraturr/Eca Jr., 2005).

Destarte, não havendo uma definição anterior que pudesse servir como referência, a saída foi criar uma tendo como base a conceituação de turismo rural proposta pelo Ministério do Turismo (MTUR). Assim, de acordo com a Associação Brasileira de Turismo Rural (Abraturr/Eca Jr., 2005: 6), o turismo rural pedagógico, passou a ser definido como:

o conjunto de atividades turísticas desenvolvidas no meio rural, comprometido com o meio ambiente e a produção agropecuária e/ou com os valores históricos de produção no universo rural, agregando valor a produtos e serviços, resgatando e promovendo o patrimônio cultural e natural da comunidade que fundamentalmente tem um acompanhamento didático pedagógico com o objetivo de aquisição de conhecimento.

Embora pareça um conceito bastante abrangente e generalista, a definição favoreceu o seu reconhecimento diante da comunidade acadêmica. Além disso, é uma definição que possibilita a compreensão de que o turismo rural pedagógico contempla diferentes dimensões, quais sejam as dimensões social, cultural, econômica, ambiental e educacional.

Tal característica o diferencia, de certa maneira, do termo turismo pedagógico. Este último serve para designar as viagens de estudos a diferentes lugares e cenários e com diferentes fins, abrangendo desde visitas aos centros históricos de grandes cidades, museus, zoológicos e igrejas até parques ecológicos, regiões litorâneas com áreas em processo de restauração e regiões com plantações de culturas distintas.

Segundo Milan (2007: 26), “o turismo pedagógico emerge como uma das recentes modalidades do mercado turístico relacionado às viagens de estudos. Entretanto, exhibe em seu aspecto conceitual uma série de confusões de ordem semântica e metodológica”.

Ainda, segundo Milan (2007: 31) o turismo pedagógico tem por objetivo proporcionar aos estudantes a oportunidade de conhecer melhor uma determinada região por meio de aulas práticas. Desta forma, é uma atividade que mistura ensino e turismo, apropriando-se de alguns de seus elementos, em especial, a viagem.

Assim, os participantes (alunos) terminam por assumir, de acordo com Spínola da Hora e Cavalcanti (2003: 224), a condição de turistas, “deslocando-se de seu lugar de origem em busca de algo novo”. No entanto, a troca de posição relaciona-se somente ao tratamento dado à atividade pedagógica. Assim, os autores Spínola da Hora e Cavalcanti (2003: 224) enfatizam que:

A compreensão da transformação de alunos em turistas implica em análise mais subjetiva do turismo, transpondo a simples ideia do deslocamento por meio de fronteiras políticas (cidades, estados, países e continentes) e da permanência por mais de 24 horas. Deve-se compreender o que faz do turista um ‘turista’, no sentido da experiência pessoal. Turista é o sujeito do turismo, aquele que realiza a viagem, o elemento dinâmico da atividade.

Turismo pedagógico e turismo rural pedagógico, portanto, são termos que, em certa medida, se equiparam no que concerne às contribuições no âmbito da educação. Tanto o turismo rural pedagógico quanto o turismo pedagógico podem ser caracterizados como importantes recursos pedagógicos. Os termos se integram em relação às suas definições.

Enquanto o primeiro assume um caráter mais geral e se associa a viagens de estudos para vários

locais geográficos e com diferentes fins, o segundo é mais específico referindo-se a um conjunto de atividades desenvolvidas no meio rural, tendo como principais elementos os saberes-fazeres do agricultor, do proprietário rural, os hábitos e costumes preservados, as atividades produtivas desenvolvidas, os animais e plantas que fazem parte desses espaços.

Para além dessas questões, outra implicação que provoca reações diversas está associada às modalidades do turismo ao qual o turismo rural pedagógico se enquadra. Dizer que essa noção situa-se mais próxima do turismo rural ou então do agroturismo exige primeiramente, um estudo aprofundado acerca das características de cada uma dessas modalidades e a relação com o turismo rural pedagógico.

De acordo com Tulik (2006), o turismo rural estaria relacionado às especificidades do rural, como paisagem rural, estilo de vida e cultura rural.

Trata-se de uma atividade que na sua forma mais original e “pura”, deve estar instituída em estruturas essencialmente rurais, de pequena escala, situadas ao ar livre, favorecendo o visitante o contato direto com a natureza, com a herança cultural das comunidades do campo e também, com as denominadas sociedades e práticas “tradicionais” (Ruschman, 2000).

Outra análise interessante acerca do agroturismo está em Sznajder et al. (2009). De acordo com estes autores, o agroturismo apresenta um conjunto de características e funções diversas, evidenciando assim o caráter multifuncional da atividade. A primeira característica apontada pelos autores relaciona-se à possibilidade de satisfazer necessidades humanas, através da participação prática no processo de produção de alimentos, na vida de uma família e na comunidade rural. A segunda refere-se à possibilidade para satisfazer a necessidade cognitiva humana ou etnográfica dentro da produção agrícola; e a terceira compreende a satisfação das necessidades emocionais, a partir do contato direto com animais domésticos, plantas, produtos de processamento, e por meio de diferentes experiências vivenciadas no rural associado a uma atmosfera de rusticidade e sossego.

Em relação ao turismo nas áreas rurais ou turismo no meio rural, trata-se de um termo que, segundo Campanhola e Graziano da Silva (2000), refere-se a qualquer atividade de lazer e turismo realizada no meio rural, envolvendo assim, várias modalidades definidas de acordo com seus elementos de oferta: agroturismo, turismo rural, turismo ecológico ou ecoturismo, turismo de aventura, turismo cultural, etc..

Assim, pode-se observar que o turismo rural, o agroturismo e o turismo no espaço rural apresentam características que os diferenciam entre si, mas que de certa forma, os mantém bastante próximos, interligados, o que pode gerar confusão em termos conceituais.

Mas, o turismo rural pedagógico pode associar-se a diversas modalidades de turismo rural ou em espaço rural. O turismo rural pedagógico contempla aspectos que variam de acordo com as características geográficas, sociais e culturais de cada região e com as especificidades de cada propriedade rural. Considerando essa diversidade presente no cenário rural e levando em conta as definições das três modalidades aqui apresentadas, pode-se presumir que a prática do turismo rural pedagógico compreende uma atividade que não pertence a um único segmento, mas que interage com vários, em especial, com o agroturismo, o turismo rural e o turismo em meio rural.

No âmbito da educação, o turismo rural pedagógico também tem se evidenciado, ganhando visibilidade enquanto uma ferramenta de ensino que vai muito além da sala de aula, desenvolvida no âmbito das propriedades rurais em que os agentes educativos não são propriamente os professores das escolas, mas sim, os agricultores.

Dentro dessa perspectiva, o turismo rural pedagógico emerge como uma prática educativa que tem como elemento orientador a aprendizagem pela experiência. Segundo Yus (2002), a aprendizagem pela experiência compreende um processo que vincula a educação, o trabalho e o desenvolvimento pessoal; um processo que exige métodos ativos, rompendo assim com o esquema tradicional de alunos passivos e receptivos.

A complexidade que permeia o termo turismo rural pedagógico pode ser evidenciada também na literatura internacional. Até o momento existem poucas referências abordando o termo turismo rural educacional. No entanto, em muitos países da Europa, verifica-se o surgimento e expansão de projetos de cooperação envolvendo escolas e propriedades rurais, as quais passam a ser vistas como ambientes pedagógicos que possibilitam a realização de atividades educativas, utilizando como recurso didático a produção agropecuária, os recursos naturais e culturais existentes.

Para D'Agostinho (2008), as atividades desenvolvidas no âmbito dessas propriedades rurais podem representar uma ferramenta bastante útil, na medida em que favorecem a introdução das novas gerações no mundo rural, através da experiência direta, constituindo-se desse modo, em um verdadeiro laboratório ao ar livre.

Nesse sentido, o termo “propriedade rural pedagógica” passa a ser utilizado como sinônimo de turismo rural pedagógico, ainda que haja discordância em relação ao fato se este seria uma modalidade de turismo ou excursionismo. Mas, neste artigo admitimos o conceito de turismo conforme expressaram Spínola da Hora e Cavalcanti (2003: 224) citados anteriormente. Embora as traduções de propriedade rural pedagógica apresentem variações de acordo com cada país e/ou idioma, as características são muito semelhantes entre si. As contribuições para o aprendizado das crianças, a valorização das tradições das famílias rurais e dos saberes-fazeres dos agricultores favorecendo a conservação da paisagem e a preservação dos recursos naturais renováveis são elementos presentes nas definições de propriedade rural pedagógica. Tais características evidenciam o caráter multifuncional dos espaços rurais e da agricultura, aspectos também identificados na prática do turismo rural pedagógico.

Sob essa perspectiva, as propriedades rurais passam a receber um novo enfoque. São locais que, segundo Gurrieri (2008), favorecem uma conexão direta entre a cidade e o campo, entre o produtor e o cidadão, entre o agricultor e o consumidor, caracterizando-se como uma importante ferramenta, capaz de impedir a dispersão do patrimônio sociocultural existente no meio rural, relativo à produção de alimentos, à terra, à natureza e ao meio ambiente.

Por conseguinte, a utilização da propriedade rural como recurso pedagógico evidencia-se como uma importante “fonte de renda para o agricultor, como uma plataforma pedagógica para o ensino e como fonte de identidade para uma população que está cada vez mais distante da agricultura” (Jolly et al., 2004: 63).

Na análise de Caffarelli et al. (2010), isto se deve ao fato de que estas atividades contemplam um conjunto significativo de objetivos que vão desde aspectos econômicos, ecológicos, patrimoniais e sociais, favorecendo desse modo o reconhecimento do papel do agricultor e da agricultura no processo de aprendizagem e valorização do meio ambiente.

Na Noruega, a compreensão do relevante papel desempenhado pelas propriedades rurais no campo da educação já está presente desde o ano de 1995 por meio do desenvolvimento de projetos de cooperação entre escolas e propriedades rurais. O objetivo da proposta nomeada de “Living School” centrou-se na criação de situações pedagógicas que oportunizassem aos alunos experiências de conexão ao seu meio natural, a partir de um trabalho contínuo realizado nas propriedades rurais (Krogth et al. 2004).

Na França, em virtude da crescente demanda social e educacional em torno das propriedades rurais pedagógicas, uma comissão interministerial reuniu-se no ano de 2001 e publicou uma circular que define as estruturas e o papel das propriedades rurais que desenvolvem atividades pedagógicas, como também, os objetivos e os tipos de públicos (Caffarelli et al., 2010).

Na Itália, no ano de 2000 foram averiguadas 273 propriedades rurais pedagógicas, destacando-se a região de Emilia-Romagna. Os objetivos dos projetos desenvolvidos nesta região visam, principalmente, reforçar a identidade local e promover a valorização dos produtos alimentícios típicos e as explorações agrícolas (Napoli, 2006).

Na Holanda, segundo Haubenhof et al. (2011), no ano de 2007 existiam em torno de 8.000 agricultores que ofereciam passeios educativos para crianças em idade escolar. As atividades envolvem o conhecimento sobre a produção de alimentos, a observação e interação com os animais da propriedade e a participação em atividades relacionadas à rotina diária dos agricultores.

No Japão, segundo Ohe (2012), no ano 2000 foi criado o programa educativo Dairy Farms, instituído por uma organização nacional para produtores de leite. O objetivo da proposta consistia em fornecer informações relacionadas à produção leiteira possibilitando assim, a compreensão sobre o papel desempenhado pela atividade leiteira na sociedade e, conseqüentemente, favorecendo um olhar mais educativo da pecuária leiteira. Neste processo, os visitantes aprendem, a partir dessa experiências, sobre a origem dos alimentos e a estreita ligação entre o alimento e vida. De acordo com o autor, no ano de 2009 havia 257 propriedades com adesão ao programa e o número de visitantes equivalia a mais de 880 mil, evidenciando a formação de mercado efetivo e a oportunidade para um novo papel social que os produtores de leite podem desempenhar na sociedade.

Diante do exposto, observa-se que o turismo rural pedagógico compreende uma atividade com múltiplas possibilidades, que perpassa por diferentes áreas do conhecimento, favorecendo o desenvolvimento rural e o reconhecimento de novas práticas desenvolvidas nas propriedades rurais, emergindo como uma ferramenta eficaz de ensino que possibilita às novas gerações conhecer um mundo diferente do seu, qual seja, o meio rural.

3. Procedimentos metodológicos

O estudo realizado utilizou como universo empírico as propriedades que integram o projeto de

turismo pedagógico “Viva Ciranda”, desenvolvido no município de Joinville, no Estado de Santa Catarina e propriedades que desenvolvem atividades de caráter educativo, inseridas no roteiro “Caminhos Rurais” da zona sul do município de Porto Alegre, no Rio Grande do Sul, ambos situados na região sul do Brasil.

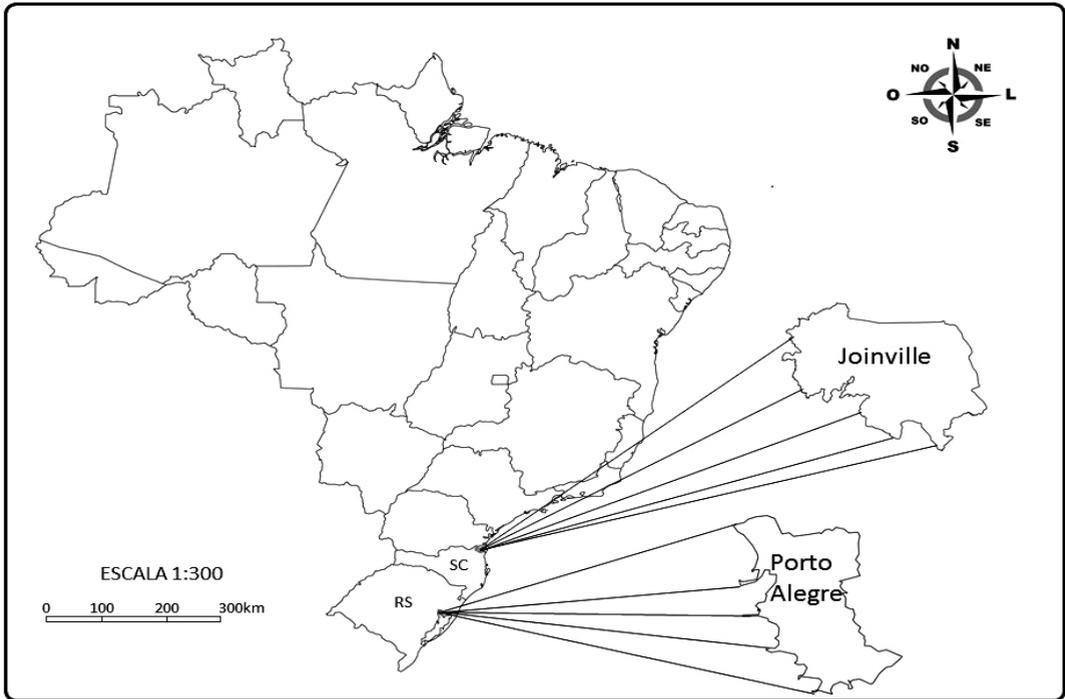
O roteiro “Caminhos Rurais” de Porto Alegre compreende uma proposta de turismo rural desenvolvida nas áreas rurais da zona sul do município de Porto Alegre, capital do Estado do Rio Grande do Sul. Com cerca de 1,5 milhões de habitantes, Porto Alegre é considerada a segunda capital brasileira com maior área rural, com aproximadamente 30% do seu território definido como espaço rural (IBGE, 2010).

O Projeto “Viva Ciranda” compreende uma proposta de turismo pedagógico que vem sendo desenvolvida no município de Joinville, localizado na região nordeste do Estado de Santa Catarina, no sul do Brasil. O município abrange uma área total de 1.147 km², com uma população de 515.220 mil habitantes (IBGE, 2010). Para mais bem evidenciar a localização dos dois municípios onde foram realizadas as coletas de informações da pesquisa apresentam-se os mesmos na figura 1.

No que concerne aos procedimentos metodológicos adotados, utilizou-se a pesquisa bibliográfica acerca da temática estudada, a observação sistemática não participante² das atividades propostas e a realização de entrevistas semi-estruturadas, com 11 proprietários rurais, donos dos empreendimentos que oferecem atividades educativas para grupos escolares, sendo 6 proprietários que integram o projeto Viva Ciranda e 5 que fazem parte do Roteiro Caminhos Rurais de Porto Alegre. Também foram entrevistadas 22 professoras, responsáveis pelas turmas de alunos que visitaram estas propriedades entre os meses de setembro a novembro de 2011. Ressalta-se que todas as entrevistas foram gravadas e posteriormente transcritas. Vale destacar que não foi utilizado software específico a fim de proceder a elaboração de categorias de análise.

Durante a realização das entrevistas procedeu-se a observação sistemática não participante. Ao final do dia e durante uma visita acompanhando os visitantes (escolares) as observações eram anotadas em forma de um diário resumido. Além desses procedimentos, também foram realizadas entrevistas não estruturadas com dois técnicos responsáveis pela elaboração e desenvolvimento do “Projeto Viva Ciranda” e com a presidente da COODESTUR - Cooperativa de Desenvolvimento e Formação do Produto Turístico, que prestava serviços ao Roteiro “Caminhos Rurais” de Porto Alegre.

Figura 1. Localização dos municípios de Porto Alegre -RS e Joinville –SC, Brasil.



Fonte: Base cartográfica do IBGE.

Elaboração: Pires, F. S.

4. Resultados e discussões

4.1. Turismo rural pedagógico no Roteiro “Caminhos Rurais de Porto Alegre”

O roteiro “Caminhos Rurais” foi se constituindo aos poucos, ao longo dos anos, tendo como ponto de partida a realização de um diagnóstico do meio rural de Porto Alegre no ano de 1994, o qual apontava a existência de inúmeras riquezas naturais, culturais e históricas presentes nas construções, nos costumes e tradições preservadas e um significativo potencial a ser explorado, por meio de serviços e atividades voltadas para o lazer e o turismo. Tais constatações evidenciaram, por conseguinte, a necessidade de formulação e implementação de políticas públicas específicas que pudessem contribuir para a ordenação do uso dos espaços rurais (Prefeitura Municipal de Porto Alegre, 1994).

Posteriormente, em 1999, novas pesquisas foram realizadas por um grupo de acadêmicos estudantes do curso de Turismo da Pontifícia Universidade Católica do Rio Grande do Sul (Rodrigues, 2011).

A realização dessas pesquisas contribuiu para a elaboração dos primeiros roteiros turísticos nas áreas rurais de Porto Alegre, com a divulgação de suas belezas naturais e históricas.

Nos anos seguintes, as iniciativas continuaram, porém sem um roteiro formalizado. Somente no ano de 2005, a Secretaria Municipal do Turismo de Porto Alegre, em parceria com a Associação Rio-grandense de Empreendimentos de Assistência Técnica e Extensão Rural (EMATER) e o Serviço Nacional de Aprendizagem Rural (SENAR), no intuito de estimular essas potencialidades, passaram a auxiliar os agricultores familiares indicando os melhores locais de suas propriedades que poderiam ser mostrados aos turistas em virtude da importância cultural ou beleza natural existente. Nesse mesmo período, realizou-se uma pesquisa entre as propriedades localizadas na zona rural de Porto Alegre, selecionando aquelas que apresentavam alguma prática rural ou o interesse em desenvolver atividades turísticas. A partir da identificação dessas propriedades interessadas na realização da atividade do turismo rural, foi criado então o

Quadro 1. Propriedades rurais que integram o “Roteiro Caminhos Rurais” de Porto Alegre, atividades produtivas e educativas, conteúdos e objetivos voltadas para os grupos escolares.

| Nomes das propriedades | Atividades produtivas desenvolvidas | Atividades educativas propostas | Conteúdos contemplados durante as atividades | Objetivos do roteiro proposto |
|--------------------------|--|--|--|--|
| Sítio Recanto das Pedras | Produção agroecológica, com cultivo de plantas medicinais, hortaliças e pomar de árvores frutíferas. | Visitação aos espaços onde estão os animais. Visitação à horta pedagógica. Oficina de alimentação saudável | Características dos animais: semelhanças e diferenças. Identificação de tipos e propriedades das plantas medicinais e hortaliças; estímulo das percepções; produção orgânica. Origem dos alimentos; noções de massa e quantidade; preparo e degustação de alimentos; noções de higiene pessoal e hábitos alimentares. | Incentivar as crianças para que tenham uma alimentação mais saudável. Promover o resgate da cultura rural. |
| Granja Santantonio | Produção agroecológica de hortaliças. Criação de animais para consumo. | Visitação às áreas de cultivo de hortaliças. Passeio de trator. | Características e importância da produção agroecológica: preparo e manejo da terra, sistema de irrigação, tipos de culturas produzidas; importância do consumo de produtos orgânicos. Impactos ambientais da agricultura convencional; benefícios da produção agroecológica; regras para se tornar um agricultor agroecológico. | Mostrar aos grupos escolares aspectos que caracterizam o modo de produção agroecológica. Possibilitar às crianças que conheçam o trabalho do agricultor, seus costumes e tradições. |
| Sítio do Mato | Cultivo de frutas e hortaliças, além da criação de pequenos animais. | Trilha ecológica. Visitação ao estábulo e ao curral. Visita aos canteiros da pequena horta. | Identificação de diferentes espécies de plantas; preservação das matas e dos recursos hídricos; tipos de animais e pássaros nativos do local; qualidade do ar. Características de alguns animais, hábitos alimentares e comportamento. Identificação de diferentes espécies de hortaliças e ervas medicinais. | Oportunizar as crianças em idade escolar vivências no meio rural, sobretudo para aquelas que vivem nos centros urbanos, sem qualquer contato com os animais, as plantas e a terra. |

Quadro 1. Propriedades rurais que integram o “Roteiro Caminhos Rurais” de Porto Alegre, atividades produtivas e educativas, conteúdos e objetivos voltadas para os grupos escolares (continuação).

| | | | | |
|---------------------|--|---|--|---|
| Sítio dos Herdeiros | Produção agroecológica de frutas e hortaliças. Criação de pequenos animais. | Visitação ao pomar de ameixas. Visitação à horta. Visitação aos espaços onde estão os pequenos animais. | Técnicas de cultivo, cuidados e colheita. Tipos de culturas produzidas; preparo e manejo da terra; plantio; cuidados básicos para o plantio e a colheita. Observação e contato com diferentes espécies de animais. | Mostrar o trabalho do agricultor no seu dia a dia. |
| Sítio do Tio Juca | Produção agroecológica de frutas e hortaliças para comercialização em feira agroecológica. | Visitação às áreas de cultivo de hortaliças e frutíferas. Roda de discussões. | Características da produção agroecológica; tipos culturas produzidas; épocas de plantio; aspectos do composto vegetal utilizado como adubo nas plantações. Características da propriedade; história de vida do produtor; diferenças entre sistema de produção agroecológico e convencional. | Mostrar às crianças a forma de produção agroecológica e o trabalho do produtor rural. |

Fonte: Pesquisa de campo (2011).

roteiro turístico “Caminhos Rurais” de Porto Alegre (Souza e Elesbão, 2009).

Em 2007, o roteiro que inicialmente abrangia 30 empreendimentos, foi ampliado e passou a contar com 41 atrativos turísticos (COODESTUR, 2008). No ano seguinte, a aprovação junto ao Ministério do Turismo (MTUR) do projeto de apoio a iniciativas de turismo de base comunitária, elaborado pela Cooperativa de Formação e Desenvolvimento do Produto Turístico (COODESTUR) em parceria com a Associação Porto Alegre Rural (POARURAL) e apoio da Prefeitura Municipal de Porto Alegre (PMPA), possibilitou a reorganização do referido roteiro, com a realização de um novo diagnóstico, cursos de capacitação, consultoria para as propriedades e material promocional. No ano de 2010, o projeto foi ampliado, recebendo uma verba para serem investidos na divulgação e promoção do roteiro e na qualificação dos empreendedores³.

Atualmente, de acordo com o relatório elaborado pela Secretaria Municipal de Turismo de Porto Alegre, o roteiro “Caminhos Rurais” abrange 31 empreendimentos oferecendo opções de lazer, gastronomia, hospedagem e experiências relacionadas à rotina de vida rural e que está distribuído em

onze bairros⁴ localizados na zona sul de Porto Alegre (Rodrigues, 2011).

Dentro desse quadro de empreendimentos, encontram-se algumas propriedades rurais que também desenvolvem atividades de caráter educativo e recreativo voltadas especificamente para grupos escolares⁵ e que, por apresentarem tais características foram objetos desta pesquisa.

As cinco propriedades analisadas, apesar de apresentarem trajetórias distintas, no que concerne à prática do turismo rural pedagógico, apresentam roteiros com atividades semelhantes e propósitos que caminham para a mesma direção, qual seja, valorizar a cultura rural a partir da apresentação das atividades produtivas, dos saberes e fazeres rurais e das tradições preservadas pela família, conforme se pode observar no Quadro 1.

4.2. Turismo rural pedagógico no Projeto Viva Ciranda

Oficialmente inaugurado em março de 2011, o referido projeto começou a ser idealizado ainda no ano de 2010 por uma equipe de profissionais da Fundação de Promoção e Planejamento Turístico de

Quadro 2. Propriedades rurais que integram o projeto “Viva Ciranda” de Joinville, atividades produtivas e educativas, conteúdos e objetivos voltados para os grupos escolares.

| Nomes das propriedades | Atividades produtivas desenvolvidas | Atividades educativas propostas | Conteúdos contemplados durante as atividades | Objetivo do roteiro proposto |
|----------------------------------|---|--|---|--|
| Agrícola da Ilha | Cultivo de flores e plantas ornamentais. | Visitação ao jardim dos Hemerocallis. Visitação ao jardim dos sentidos. Lago dos peixes ornamentais. Trilha ecológica. | Variedades de plantas e flores; partes das flores; floração; fases do plantio; processo de reprodução, e formação de novas variedades. Desenvolvimento dos sentidos por meio de atividades sensoriais e lúdicas. Cuidados com a água, coloração dos peixes, alimentação, origem dos peixes. Tipo de vegetação; preservação da natureza; clima, captação e armazenamento de água da chuva. | Mostrar às crianças a importância das plantas para a vida delas, para o meio ambiente. Explicar o processo de produção e cultivo de flores. |
| Propriedade da Família Schroeder | Produção agroecológica de hortifrutigranjeiros. Criação de coelhos. Produção de leite de cabra e de vaca. | Visitação à horta orgânica; ao pomar e jardim. Atividades de interação com pequenos animais. | Forma de produção orgânica; tipos de culturas produzidas; identificação de espécies de plantas medicinais e árvores frutíferas. Características dos animais; cuidados necessários com os animais; estímulo às sensações através do contato direto. | Apresentar o dia a dia dos agricultores, as atividades agrícolas e pecuárias desenvolvidas. |
| Sítio Vale das Nascentes | Produção de frutas. Cultivo de hortaliças. | Atividade lúdica: identificação dos sons de diferentes pássaros produzidos por apitos. Visita à casa de pedra. Observação dos animais existentes. Oportunidade de alimentar as aves domésticas e peixes. Visita às nascentes. | Características dos pássaros predominantes na região; importância das aves na preservação das matas. Lixo urbano e poluição do meio ambiente; reciclagem e reaproveitamento; preservação da natureza. Observação e interação com aves domésticas e peixes. Estímulo das percepções; observação de nascentes; importância da água para a vida; qualidade do ar. | Promover a educação ambiental, especialmente com relação aos recursos hídricos. |

Quadro 2. Propriedades rurais que integram o projeto “Viva Ciranda” de Joinville, atividades produtivas e educativas, conteúdos e objetivos voltados para os grupos escolares (continuação).

| | | | | |
|------------------------------------|--|--|--|---|
| Propriedade do Senhor Ango Kersten | Produção de cana-de-açúcar e melado. Cultivo de produtos agrícolas. Produção leiteira. | Passeio de trator pela propriedade. Observação do sistema de tratamento de água feito com raízes de junco. Visitação ao museu rural. Visita ao curral aos pequenos animais e aves que vivem na propriedade. | Identificação de diferentes espécies de árvores; Histórico da produção e manejo da cana-de-açúcar e derivados. Conhecimento do sistema utilizado no tratamento e reutilização de água para consumo. Cultura e tradição a partir da identificação de diferentes objetos antigos. Observação de animais com diferentes características. | Vivenciar diferentes experiências em contato com a produção agrícola, o meio ambiente e a cultura do mundo rural. |
| Apiário PFAU | Produção de mel, de hortaliças e tubérculos. Criação de vacas leiteiras e galinhas caipiras. | Apresentação do mundo das abelhas. Atividades lúdicas de identificação das abelhas. Caminhada até o Rio da Prata. | Características e importância das abelhas; processo de produção do mel e seus benefícios para a saúde; derivados do mel; a vida do apicultor. Identificação das abelhas e colméias de acordo com as imagens; atenção e observação. A importância da água e das flores na produção do mel; a preservação dos recursos hídricos. | Destacar o importante papel desempenhado por esses insetos no equilíbrio da natureza. |
| CTG Chaparral | Pecuária, especialmente bovinocultura e equinocultura; Produção de arroz. | Apresentação do cavalo crioulo e de suas características. Atividade de laço e montaria. Passeio de charrete pela propriedade. | Características, hábitos e comportamentos do cavalo crioulo. Coordenação motora; equilíbrio, atenção; superação de limites pessoais. Observação de potros e éguas; interação grupal. | Promover uma compreensão mais aprofundada acerca da criação e doma dos cavalos. |

Fonte: Pesquisa de campo (2011)

Joinville (PROMOTUR) que, percebendo o cenário favorável existente na região, não somente em relação aos atrativos naturais e culturais, mas, sobretudo, pelo público potencial presente⁶, decidiu investir e elaborar uma proposta envolvendo propriedades rurais e escolas.

A primeira dessas etapas consistiu na seleção das propriedades⁷. Como a equipe em questão já possuía um conhecimento mais aprofundado das áreas rurais

do município de Joinville foi diretamente às propriedades que apresentavam potenciais ou que já tinham alguma experiência de turismo rural pedagógico, isto é, que não precisariam de grandes investimentos e que tivessem interesse em inserir-se no projeto. Nesse sentido, visando elaborar um roteiro que não suscitasse concorrência interna entre os participantes, onde cada um tivesse seu foco, mapearam-se estas propriedades, buscando ofertar diferentes atividades.

A segunda etapa compreendeu a realização do diagnóstico das propriedades, objetivando conhecer as características físicas e estruturais das mesmas e o perfil dos proprietários. Pretendeu-se ainda, apresentar e explicar o projeto para estas famílias, buscando despertar o interesse e motivá-los a participar de um teste-piloto. Alguns aceitaram o desafio, outros não foram aceitos por não apresentarem uma estrutura física segura e adequada no momento. Este é um aspecto importante, pois segundo D'Agostinho (2008) a organização e a segurança da propriedade é um dos elementos de sucesso no desenvolvimento desta atividade. Mas, a partir desse grupo de interessados e com estruturas adequadas, formou-se um roteiro com seis propriedades, divididas em temas-chave – água e meio ambiente, flores, pequenos animais, cavalos, produção de mel e melado.

Na terceira etapa, contratou-se uma pedagoga que visitou as propriedades, conversou com os proprietários e, a partir dos recursos identificados em cada uma delas, desenvolveu em conjunto com os mesmos entre duas a três atividades para cada uma delas. Feito isso, conseguiu-se então estabelecer uma parceria com a Secretaria da Educação do município, que disponibilizou um ônibus e selecionou uma escola para a realização do teste-piloto no segundo semestre de 2010. Posteriormente, uma pedagoga efetiva foi cedida pela Secretaria para trabalhar exclusivamente no projeto.

Com esse teste, conseguiram-se fotos e materiais para elaborar uma cartilha e incrementar uma proposta maior que foi apresentada ao Ministério do Turismo em Brasília em dezembro de 2010, e cuja aprovação ocorreu no mesmo mês. O referido órgão governamental disponibilizou 168 mil reais para a execução do projeto, o que permitiu subsidiar 55 visitas às propriedades, material de divulgação e cursos de capacitação, estruturadas em 4 oficinas: uma oficina direcionada para a organização da propriedade, duas oficinas com enfoque nos recursos naturais e meio ambiente e a quarta oficina enfocando nas atividades lúdicas e pedagógicas para serem desenvolvidas na propriedade.

Dentro das capacitações, foram realizadas ainda duas visitas técnicas, sendo uma para a cidade de Urubici, localizada na Serra Catarinense, onde o grupo teve a oportunidade de conhecer um conjunto de propriedades de turismo rural estruturado e organizado. A segunda visita técnica compreendeu uma viagem para a França com o objetivo de fazer com que os agricultores tivessem uma vivência fora do seu ambiente habitual, buscando com isso motivá-los e também, apresentar experiências bem sucedidas de turismo rural pedagógico. Assim, dos seis proprietários, 3 foram contemplados com a viagem em virtude de serem os únicos que possuíam a Declaração

de Aptidão ao PRONAF8, uma das exigências do Ministério do Turismo.

Além disso, o projeto previu a possibilidade de visitas de escolares sem o pagamento. 48 destas visitas contemplavam as seis propriedades do projeto e 7 seriam realizadas nas “novas” propriedades que seriam inseridas na proposta no ano de 2012. Para tal, foram selecionadas 4 escolas municipais localizadas em regiões com menor IDH (Índice de Desenvolvimento Humano) do município de Joinville. Todas as 55 visitas foram monitoradas pela pedagoga, no sentido de orientar e dar suporte às ações do proprietário e dos professores responsáveis pelas turmas. A realização destas visitas, como também a confecção de material de divulgação e oferecimento de treinamentos aos agricultores participantes foi possível uma vez que o Ministério do Turismo disponibilizou recursos financeiros da ordem de 168 mil reais para a execução do projeto.

Tais iniciativas promovidas em 2011, associada ao interesse e envolvimento dos proprietários e a constante atuação da equipe da PROMOTUR junto aos envolvidos, favoreceu a ampliação do projeto que, em 2012 passou a contar com mais 7 empreendimentos.

A repercussão emergiu em nível nacional, sobretudo, por meio da imprensa local e dos meios midiáticos, que têm divulgado o sucesso do projeto “Viva Ciranda” e os resultados decorrentes da prática do turismo rural pedagógico no contexto escolar. A proposta também despertou o interesse do meio acadêmico e científico, tornando-se foco de diferentes estudos.

Um resumo das atividades produtivas e educativas, conteúdos contemplados durante o desenvolvimento das atividades e os objetivos propostos nas propriedades estão apresentados no quadro 2.

Apesar de não se constituir em objetivo desta pesquisa vale destacar um discurso direto de um dos entrevistados do projeto que trata do impacto da atividade nas propriedades:

“A gente não está visando a questão econômica, mas sim pensando na questão social e fazer com que a gente consiga ajudar a mudar gerações, no sentido de fazer com que essas crianças nesse período de aprendizado possam saber que esse setor existe, que a questão de valorizar o plantio de uma árvore é super importante, tanto no meio rural quanto no meio urbano (entrevistado)”.

Para o proprietário, a finalidade, em certa medida, não está nos ganhos financeiros provenientes da recepção dos grupos, mas sim nas contribuições que estas atividades podem trazer em termos sociais e ambientais. Tais argumentações explicitam o caráter multifuncional das atividades agrícolas e enfatizam a função social desempenhada pelas propriedades rurais na atual conjuntura. Ao mesmo tempo, se fortalece a preocupação com o meio ambiente, assu-

mindando papel de destaque nas ações dos agricultores e proprietários rurais.

4.3. Especificidades e similaridades das propriedades rurais analisadas e das atividades propostas

A análise das informações coletadas evidencia duas experiências diferenciadas, em estágios de desenvolvimento bastante distintos no que concerne à prática do turismo rural pedagógico. No caso do Projeto “Viva Ciranda”, no município de Joinville, desde o princípio o foco central foi o turismo pedagógico e todas as ações promovidas pelos sujeitos envolvidos direcionaram-se para este aspecto.

Conseqüentemente, a questão do planejamento passa a figurar como um dos pilares do projeto, podendo ser identificado não apenas nos objetivos estabelecidos pela equipe responsável, mas também, nas etapas a serem cumpridas, na orientação aos proprietários, no monitoramento constante das atividades realizadas, na realização de cursos de capacitação e encontros para discutir os pontos a serem melhorados e na avaliação das atividades. Até mesmo os proprietários que já desenvolviam atividades com turmas de crianças, passaram a desenvolver uma proposta com um enfoque mais pedagógico e com uma estrutura mais organizada.

Já, no Roteiro “Caminhos Rurais” de Porto Alegre, a ênfase maior concentrou-se na divulgação e promoção dos empreendimentos turísticos. A iniciativa em receber grupos escolares, desse modo, surgiu individualmente, sem incentivos ou apoio externo e sem orientação na elaboração das atividades pedagógicas. O roteiro foi sendo construído ao longo do tempo, com os erros e acertos evidenciados em cada nova situação. As experiências práticas, associadas aos conhecimentos adquiridos ao longo da vida, a chamada “sabedoria antiga” destacada por Tibiletti (2002) foram e continuam sendo os principais elementos orientadores no desenvolvimento das atividades com grupos escolares.

No que diz respeito às estratégias utilizadas pelos proprietários no desenvolvimento das referidas atividades, observa-se que alguns apenas expõem seus saberes, explicam os processos de produção e os alunos ouvem e observam, porém, sem envolver-se de fato nas atividades. Seria o caso averiguado no Sítio do Tio Juca. Outros seguem uma abordagem mais sensorial, com a realização de várias atividades práticas envolvendo os sentidos (tato, olfato, visão, audição, paladar), a exemplo do Sítio Recanto das Pedras e da Agrícola da Ilha. Há ainda aqueles que apresentam um enfoque mais lúdico, com a realização de diferentes atividades lúdicas e recreativas. Nesse grupo, destacar-se-ia o Sítio do Mato. No grupo maior, estão aqueles que combinam uma fala inicial mais

expositiva seguido de atividades práticas envolvendo o contato direto com a terra e os animais.

Ressalva-se que o fato de utilizar um ou outro enfoque não significa necessariamente que as atividades desenvolvidas na propriedade não apresentem as demais características. Por serem atividades realizadas ao ar livre, que envolvem os recursos da natureza como recurso didático, tendo como público alvo turmas de diferentes faixas etárias, provenientes de distintos contextos sócio-culturais, estas atividades são em sua essência, dinâmicas. Isso porque a natureza possui ciclos e mudanças de estações, assim como os grupos são diversos, o que exige certa criatividade e flexibilidade de quem desenvolve as atividades.

Apesar das diferenças identificadas entre uma experiência e outra, e até mesmo entre uma propriedade e outra, há um aspecto que permanece presente em todos os roteiros propostos: são vivências que possibilitam aos alunos o contato direto com o meio rural e com a natureza, favorecendo a compreensão em menor ou maior escala, de questões relacionadas à origem dos alimentos, à vida animal e vegetal, aos recursos hídricos e as formas de produção sustentáveis, a exemplo, da produção agroecológica.

Tais aspectos podem ser trabalhados nas diferentes áreas do conhecimento, dentro de uma perspectiva interdisciplinar integrando teoria e prática. Temas como localização geográfica, diferenças entre rural e urbano, tipos de solo, culturas de verão e de inverno, tipos de vegetação, cursos d’água, (Geografia); características dos animais, em relação ao modo de reprodução, alimentação, habitat, comportamentos e importância para o meio ambiente; características do processo de produção orgânico e alimentação saudável (Ciências); tamanhos, quantidade, medidas, diferenças e semelhanças (Matemática); história da região, aspectos comparativos entre a agricultura atual e de antigamente, modos de vida e costumes de antigamente (História) são alguns dos conteúdos possíveis de serem contemplados durante a realização das atividades educativas desenvolvidas nas propriedades rurais analisadas.

Em face disso, a análise das atividades desenvolvidas nas 11 propriedades rurais pesquisadas evidenciou várias questões que favorecem um entendimento mais aprofundado acerca da prática do turismo rural pedagógico, a partir da identificação de um conjunto de elementos relacionados a quatro questões-chave. A primeira delas compreende a ideia do “aprender-fazendo”, representada pelas atividades práticas e experiências vivenciadas no meio rural, junto à natureza, conforme destacado por Gurrieri (2008). A segunda refere-se à educação ambiental, evidenciada pelas explanações acerca da preservação da flora, fauna e dos recursos hídricos, do processo de produção agroecológico e dos cuidados para com as plantas e os animais. A terceira questão,

por sua vez, está associada à valorização da cultura rural, isto é, ao dia a dia do agricultor, às atividades agrícolas e pecuárias desenvolvidas na propriedade e aos costumes e tradições das famílias rurais. E por último, está a educação alimentar e nutricional ressaltada nas discussões a respeito da origem dos alimentos, dos benefícios de uma alimentação saudável, do valor nutricional de certos alimentos e das propriedades medicinais de algumas plantas, aspecto muito bem reforçado por Canavari et al. (2011) no desenvolvimento das atividades educativas nas propriedades rurais.

Para além dessas questões, constatou-se ainda que a prática do turismo rural pedagógico desenvolvida no âmbito das propriedades favorece o aprendizado das crianças e dos adolescentes devido a possibilidade de “mergulharem” no mundo das experiências, das brincadeiras ao ar livre, das trocas, possibilitando assim, uma infância marcada não pelo tempo cronológico, mas pelas experiências vividas. O turismo rural pedagógico desenvolvido nas duas experiências brasileiras pesquisadas emerge como uma atividade inovadora que pode ser implantada com poucos recursos, conforme enfatizou Ohe (2007), possibilitando um novo olhar por parte dos cidadãos para as propriedades rurais envolvidas e para o meio rural como um todo. Se a motivação inicial para adesão implantação do turismo rural pedagógico é de natureza financeira, após a implantação da atividade esta motivação parece ceder lugar a outras motivações como, por exemplo, o aumento das relações interpessoais, a valorização da vida e da cultura rural, do meio ambiente e de uma agricultura de caráter mais sustentável.

5. Considerações finais

O turismo rural pedagógico compreende uma atividade de caráter inovador que emerge num cenário cujas transformações são constantes e intensas. As mudanças sociais, políticas, econômicas, culturais, ambientais e tecnológicas trazem à tona um cenário profícuo, caracterizado pela busca de novas alternativas de caráter sustentável e que favoreçam a sociedade como um todo. Dentro dessa conjuntura, o termo turismo rural pedagógico surge como um tema de grande relevância, tanto no âmbito do desenvolvimento rural quanto na perspectiva da educação. No âmbito do desenvolvimento rural o turismo rural pedagógico situa-se numa perspectiva de pensar o rural tomando em conta os seguintes aspectos: a integração intersetorial, a maior diversificação socioeconômica, as relações de complementariedades e a valorização dos patrimônios cultural e natural.

Assim, embora ainda seja considerado um tema pouco estudado, as experiências envolvendo a prática

do turismo rural pedagógico tem se consolidado e se expandido em diferentes países, o que demonstra a relevância desse tema no cenário atual.

Na pesquisa realizada nas propriedades que integram o Roteiro “Caminhos Rurais” de Porto Alegre (RS) e o projeto “Viva Ciranda” (SC), foi possível constatar esta importante função socioeducativa desempenhada pelas atividades produtivas e espaços rurais. Também evidenciou o papel das propriedades rurais, que passam a figurar como importantes ferramentas no desenvolvimento de valores relacionados ao meio ambiente, à cultura rural e à convivência social, aspecto este que vai ao encontro dos resultados apontados nos estudos realizados em países como a França, Itália, Noruega, Finlândia Holanda e Japão.

Nesse contexto, o caráter multifuncional da atividade agrícola e dos espaços rurais é fortalecido, do mesmo modo que o trabalho do agricultor passa a receber um novo olhar por parte dos cidadãos, sobretudo, das crianças que visitam as propriedades. Questões como preservação da mata ciliar, dos solos, dos recursos hídricos e a valorização dos costumes e tradições característicos do meio rural começam a receber uma atenção redobrada por parte dos proprietários rurais. Essa reconexão, por sua vez, favorece o resgate da identidade desses sujeitos como seres comunitários, integrados ao meio sociocultural em que vivem.

Conforme foi possível averiguar, a prática do turismo rural pedagógico vislumbrado nas duas experiências analisadas apresenta um conjunto de características que possibilitam a elaboração de um projeto escolar cujo alicerce poderia vir a ser a realização constante de visitas ao meio rural, a essas propriedades rurais pedagógicas.

Assim, além de contribuir para o processo de aprendizagem, favorecendo o aprofundamento de temas aprendidos em sala de aula e de possibilitar o conhecimento de questões relacionadas ao meio ambiente e alimentação saudável, a prática desse tipo de atividade permite às crianças e adolescentes experiências em contato direto com o meio natural e rural, as quais raramente são vivenciadas no seu cotidiano.

Todos esses elementos convergem para uma conclusão, de que as experiências brasileiras envolvendo a prática do turismo rural pedagógico no âmbito das propriedades rurais, assim como as demais experiências desenvolvidas em outros países, emergem como importantes ferramentas para o ensino; como estratégia de desenvolvimento econômico, permitindo aos proprietários rurais o aumento da renda da família, agregando valor aos produtos e serviços realizados em sua propriedade; e por fim, como elemento chave no processo que permita recuperar o valor atribuído aos alimentos e sua relação com a cultura.

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Notas

- 1 Na França, por exemplo, utiliza-se a palavra *fermes pédagogiques*; na Itália, *fattorie didattiche*; em Portugal, *quintas pedagógicas*; e no Chile e Argentina, *granjas educativas*. Na Noruega, o termo *green care* tem se difundido de modo significativo nos últimos anos, assim como a expressão *the farm as a pedagogical resource*. Nos Estados Unidos utilizam-se as expressões *farms-to-school* e/ou *educational farms*.
- 2 Segundo Cotanda et al. (2008: 79), trata-se de uma "estratégia de construção de informações acerca de uma realidade não mediada por materiais documentais ou narrativas orais, como entrevistas, que visa a apreender práticas e comportamentos no momento em que se desenrolam".
- 3 Informações concedidas pela senhora Aline Moraes Cunha atual presidente da Cooperativa de Formação e Desenvolvimento do Produto Turístico (COODESTUR). Conforme a entrevistada, o primeiro orçamento liberado pelo MTUR (2008-2009) foi de R\$ 147.560,00 e o segundo orçamento, concernente ao período de 2010-2012 compreendeu um valor total de R\$ 520.000,00.
- 4 Os bairros do município de Porto Alegre que fazem parte do projeto Caminhos Rurais são: Belém Novo, Belém Velho, Lami, Vila Nova, Restinga, Cascata, Ipanema, Lageado, Hípica, Lomba do Pinheiro e Campo Novo.
- 5 Vale destacar que o efeito econômico desta atividade é importante, mas de caráter complementar ao da atividade agrícola. Apenas em um dos casos o rendimento da atividade turística constitui-se na renda principal da propriedade. Geralmente é cobrada uma taxa de visitação per capita dos estudantes que se situa em torno de US\$2,50.
- 6 De acordo com os dados do Censo Escolar de 2011, o município de Joinville possui 20.357 crianças matriculadas na Educação Infantil, sendo 10.908 em escolas municipais e 9.449 em escolas particulares. No ensino fundamental da 1ª a 4ª série, existem 36.844 alunos matriculados (7.279 em escolas estaduais, 25.068 em escolas municipais e 4.497 em escolas particulares). Já nas séries finais do ensino fundamental, da 5ª a 8ª série, há 32.024 alunos matriculados (7.649 em escolas estaduais, 20.611 em escolas municipais e 3.794 em escolas particulares) (INEP, 2011).
- 7 As informações relacionadas ao projeto "Viva Ciranda" foram obtidas por meio de entrevistas semi estruturadas realizadas com o coordenador do projeto, Vinicius Boneli Vieira, e com a assessora técnica, Thaíse Costa Guzzatti.
- 8 Instrumento que identifica os agricultores aptos a realizarem operações de crédito rural ao amparo do Programa Nacional de Fortalecimento da Agricultura Familiar – PRONAF.

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The evolution of profile and motivations of agro-tourists in Rio Grande do Sul/Brasil

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Abstract: This article aims to assess the profile of agro-tourists and their motivations for agro- and rural tourism, from the point of view of the owners of agro-tourism establishments in the Southern Half of the state Rio Grande do Sul, in Brazil. Data was collected in a census approach of the rural tourism properties in four distinct moments in time, between 1997 and 2011. Results show that most tourists are domestic, come for short breaks, even though overcoming distances of several hundreds of kilometers, with many showing loyalty to the unit. Although relaxation and escape from urban life is a main motive visible, there is an apparent trend towards more diversified tourism motivations, and activities sought, yielding relaxing, recreational, healthy, culturally enriching and emotional tourist experiences, associated to the specificities of the visited territory and rural tourism property.

Key Words: Rio Grande do Sul/ Brasil, rural tourist market, tourist motivations, agro-tourism, Market evolution.

La evolución del perfil y las motivaciones de los agro-turismo en Rio Grande do Sul / Brasil

Resumen: El presente trabajo visa conocer al perfil de los agro-turistas y a sus motivaciones para el agro-turismo y turismo rural, del punto de vista de los propietarios de las unidades de agro-turismo en la mitad Sul del Estado de Rio Grande do Sul, en Brazil. Datos recogiran-se por un proceso de censo referente a todas las propiedades de turismo rural en quatro momentos distintos en el tiempo, entre 1997 y 2011. Los resultados muestran que los turistas son maioritariamente domesticos, hacen una visita de curta duración, mismo llegando de distancias de varias centenas de kilómetros, sendo relevante el nivel de lealdad a la unidad de agro-turismo observado en gran parte del mercado. Aparte de los motivos principales de relajamiento y fuga de la vida urbana, visibles en los datos, hay una tendencia aparente en dirección a motivaciones turísticas mas diversificadas, visando experiencias relajantes, recreativas, sanas, culturalmente enriquecedores y emocionantes, asociadas a las especificidades del território e de la unidad de agro-turismo visitados.

Palabras Clave: Rio Grande do Sul/ Brasil, Mercado turístico rural, motivaciones turísticas, agroturismo, la evolución del mercado.

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1. Introduction

Rural tourism has led many rural areas to the, sometimes exaggerated, hope of solving all kind of problems, being perceived as a miraculous development tool (Ribeiro & Marques, 2002; Sharpley & Roberts, 2004). Some stress the potential of tourism diversifying the local rural economy and thereby overcoming agricultural crisis through alternative economic activities (OCDE, 1994; Sharpley & Roberts, 2004), inclusively helping maintain the agricultural activity, being a welcome additional source of income for farmers (Sharpley & Vass, 2006). As a matter of fact, authors like Cavaco (1995) and Almeida & Souza (2006) highlight the role of agricultural activity as a main ingredient and attractor of rural tourism. However, this does not necessarily imply that rural tourism is a miraculous catalyst of development in any rural context, with some authors calling for a more realistic view to evaluate the real potential of a rural area for successful and sustainable tourism development (Kastenholz, 2004; Ribeiro & Marques, 2002; Saxena, Clark, Oliver, & Ilbery, 2007; Sharpley, 2005). Appealing tourist attractions, basic services and facilities are needed, but may not be sufficient (Kastenholz, 2006). A good understanding of the market, its profile, behavior and motivations is also necessary to develop successful and competitive rural tourism products, which should help manage not only supply but also demand, yielding sustainable destination development (Kastenholz, 2004; Lane, 2009).

Several studies have already analyzed the rural tourist market in diverse countries (eg. Molera & Albaladecho, 2007 in Spain; Frochot, 2005 in Scotland; Kastenholz, 2004 and Eusébio & Kastenholz, 2011 in Portugal), however little is known about the Brazilian rural tourist market. It is in this context that the present study tries to contribute to an improved understanding of this market, more specifically agro-tourism, relying on the experience of all owners of agro-tourism accommodation units interviewed in the Southern half of Rio Grande do Sul, in a census approach, specifically in four different moments in time, from 1997 to 2011. This approach also permits analyzing the market's evolution. Results reveal common and distinct features of this market and may contribute to improved service, experience and destination marketing in rural areas in Southern Brazil.

2. Agrotourism and rural tourism

2.1. Definitions

Agro-tourism may be understood as a specific type of rural tourism or tourism taking place in

rural areas. Calatrava and Avilés (1993) suggest that rural tourism should include *rural culture* as a core component, with personalized contact as relevant as integration into the rural environment and community life. Lane (1994) in his seminal article "What is rural tourism?" suggests that it should ideally be: located in rural areas; functionally rural (based on specific features and resources of the rural territory), rural (small) in scale and traditional in character, organically and slowly growing and controlled by local people. Some call for the presence of agriculture as a core element (e.g. Cavaco, 1995; Almeida & Souza, 2006), while others stress the contrast to stressful, noisy and unhealthy urban life and the corresponding idealization of rural life (Figueiredo, 2008; Sims, 2009). However, a variety of motives have been identified when analysing the rural tourist market (Kastenholz, 2004; Frochot 2005; Molera & Albaladecho, 2007), where the search of nature stands out (Eusébio & Kastenholz, 2011; Figueiredo, 2008; Kastenholz Duane, & Paul, 1999; Park & Yoon, 2009; Frochot 2005), a personalized host-guest contact (Kastenholz & Sparrer, 2009), an interest in exploring culture and history (Eusébio & Kastenholz, 2011), with diverse motivational segments identifiable (Kastenholz et al., 1999; Frochot, 2005).

For those tourists seeking mostly to get to know and participate in the "rural way of life", agro-tourism should be the ideal form of rural tourism, but it actually only represents one segment or even "niche" amongst several "market niches", the rural tourism market is composed of (Clemenson & Lane, 1997). It may, in fact, constitute a particularly relevant tourism format when considering its impact on rural development, since it may help maintain agriculture and associated activities pursued by farmers, through "pluri-activity" (Sharpley & Vass, 2006; Williams & Shaw, 1998).

Beni (2000, p. 9) defines agro-tourism as "*a movement of people to rural areas, in programmed or spontaneous routes, with or without overnight stay, for enjoying sceneries and observing, living and participating in farming activities*". The author further explains that agro-tourism differs from rural tourism in so far as farming should represent the primary source of income, with tourism being complementary, while these farming activities represent simultaneously a distinct tourism attraction, permitting an experience of "authentic farm life" and even an active participation in it, if desired.

There is no official definition or classification of rural or agro-tourism in Brazil, but much of the existing supply is associated to a diversification of agriculture, taking place in working farms, with distinct dimensions and specializations, also shaped

by the particularities of distinct Brazilian states (Almeida & Souza, 2006).

Rural tourism is mainly based on urban demand, both in Brazil and in Europe (Cawley & Gilmore, 2008; EMBRATUR, 1994; Figueiredo, 2008; Lane, 2009), very much motivated by the wish to escape from the stress of city life, return to nature and a relaxing, healthy life, leading to a potentially mutually beneficial encounter and exchange between the urban and the rural populations.

2.2. Insights into the rural tourism market

The rural tourist market has been growing in number and diversity in several, particularly European countries (European Commission, 1999; Lane, 2009; OCDE, 1994), being in some countries a predominantly domestic phenomenon (e.g. UK, Germany), in others also attracting the international tourist market (e.g. Italy, Austria, some regions of Spain and Portugal). Several studies carried out in Europe about this market reveal that rural tourists tend to belong to the mid-high class, possess higher levels of education, may be from all age ranges, with an increasingly experienced and demanding market looking for diversified experiences in both weekend short-break and long holiday contexts (European Commission, 1999; Lane, 2009; OCDE, 1994). Lane (2009) underlines the increasing relevance of the highly mobile, independent traveler, exploring diverse facets of rural territories. This traveler, searching new destinations and experiences, represents, according to recent data (Eurobarometer, 2010), a segment of about 28% of the European population.

Zimmermann (1996), Saxena et al. (2007) and Kastenholtz, Carneiro, & Marques (2012) stress that several elements integrate the overall tourism product in rural territories permitting diverse and complex experiences that respond to a wide set of motivations (Lane, 2009). Already mentioned important motivating factors may be summarized as follows, with motivations naturally overlapping:

- Search for proximity to *nature* (Eusébio & Kastenholtz, 2011; Figueiredo, 2008; Kastenholtz et al., 1999; Park & Yoon, 2009; Frohot 2005; Molera & Albaladecho, 2007; Park & Yoon, 2009; Rodrigues et al, 2010; Zimmermann, 1996) and activities in nature (rather sportive, recreational or observational), also just for its aesthetic pleasure (also the human-shaped landscapes are highly appreciated) and even spiritual fruition (Rodrigues & Kastenholtz, 2010).
- Looking for *peace and quiet*, as a main leitmotiv, *seeking to escape the city*, its stress, congestion, noise and pollution and slowing down, frequently associated with *seeking health and*

wellness (Sidali & Schulze, 2010; Lane 2009; Marques, 2006; Molera & Albaladecho, 2007; Silva, 2009; Rodrigues et al 2010). This motive is close to the wish to just *relax, get away from it all* (Kastenholtz et al, 2012b).

- On the other hand, there is a wish *to be active*, get involved, both in *nature* (e.g. more or less adventurous or physically demanding outdoors activities), and in a *cultural/ educational sense* (e.g. learning the preparation of a traditional dish, a handicraft, participating in harvests). *Recreational opportunities* (e.g. games, a swimming pool or tennis court) may be provided in the rural tourism context to address this wish of activity.
- Living a *cultural experience*, with traces from history also spread over rural territories (Eusébio & Kastenholtz, 2011; Ribeiro, Souto & Santos, 2012), e.g. exploring monuments, castles and manor houses belonging to the rural aristocracy, but particularly through a broad interest in ethnography revealing specificities of rural living contexts (Kastenholtz & Sparrer, 2009; Pereiro & Conde, 2005; Silva, 2009; Zimmermann 1996), for example through the contact with an artisan showing how to produce handicraft, through the participation in a local festivity with traditional folk music and dances or through the simple sharing of typical food;
- Interest in *rural way of life*, traditions, agriculture, local food, close social contacts (Cavaco, 1995; Sidali et al, 2013; Sims, 2009; Lane, 2009; Zimmermann 1996), sometimes associated to family origins or nostalgia of a “happy childhood”, leading individuals with a migration background to return to their land of (family) origin (Rodrigues, Kastenholtz & Morais, 2012).
- Seeking a *personalized host-guest contact*, helping enter a distinct cultural context through “cultural brokerage” (Kastenholtz & Sparrer, 2009; Kastenholtz, Eusébio, Carneiro, & Figueiredo, 2013; Zimmermann 1996) and enhancing a unique type of experience and trustful, on-going relationships (Sidali et al, 2013; Loureiro & Kastenholtz, 2011). This personalized contact does not only occur in the tourism service, but also in a broader host community- visitor context and may be valued as a unique dimension of the overall rural tourist experience, by residents and visitors alike (Kastenholtz, et al, 2012b).
- The wish to *be together with friends and family* in a distinct context, especially interesting for families with *small children*, for educational reasons (learn about rurality, traditions and nature) and due to the *freedom of movement* in natural spaces (Kastenholtz & Sparrer, 2009),

revealing another important social dimension of the rural tourism experience (Molera & Albaladecho, 2007).

- Living an *experience rich in emotions and sensations*, reaching from the aesthetic pleasures of beautiful landscapes, over the relaxing experience of sounds of nature and silence (absence of sounds!), the delighting, distinct flavors of local food and wine, the smells of food and nature and the tactile experiences regarding rough and varied material of nature and traditional craft (Agapito, et al., 2013; Kastenholz et al., 2012a; Loureiro & Kastenholz, 2011; Marques, 2011; Pires, 2001).
- As a matter of fact, the *food experience* stands out as a sensorial, but also as a cultural one, representing food traditions of the visited place - in contrast to the frequently standardized urban food, people eat quickly for convenience - typically home-made dishes, with ingredients from the local agriculture, produced in traditional ways and consumed in particular, sometimes ritualistic contexts and being, by itself, a symbol of cultural identity of the territory/ community visited (Pereiro & Conde, 2005; Sims 2009; Sidali et al, 2013).

Swarbrooke and Horner (2002) distinguish physical, cultural, emotional, personal, status and self-development motives, which apparently may all be satisfied in rural tourism contexts, as mirrored in the specific motivations identified above, which may, indeed, overlap or simultaneously condition one rural holiday experience. In this line of argument, Pires (2001, p. 57) suggests that a tourist staying at a rural property “[...] shows diffuse motivations, which are sometimes difficult to categorize, since motivations are many, all of them intertwined and nearly all of similar importance to the tourist.” Indeed, different motives are frequently present in one tourist experience, while also a person’s living context, for example shaped by one’s family life cycle (particularly presence of young children, but also marital status), professional or health situation, determines motivational changes over time (Decrop, 2006). In any case, rural tourism motivations have been shown to be diverse, as is its tourist market, with distinct groups of people showing different (combinations of) motivations, undertaking distinct activities and consequently living distinct experiences when visiting rural areas (Clemenson & Lane, 1997; Frochot, 2005; Kastenholz et al., 1999; Kastenholz et al, 2012a; Lane, 2009; Molera & Albaladecho, 2007; Sidali & Schulze, 2010).

In Brazil, rural tourism is much associated to the diversification of agriculture, beginning with initiatives in 1986 in Lages/ Santa Catarina, while today numerous rural properties offer tourism activities (Ministério do Turismo, 2010). These are, however, neither legally classified, nor registered and no official statistics on the phenomenon exist, making its analysis a difficult task (Almeida & Souza, 2006). The Brazilian Ministério do Turismo (2010, p. 16) recognizes that “*the growth of rural tourism in Brazil has happened, mostly, in an ‘empirical’ way, with distinct features all over the country and even distinct designations*”.

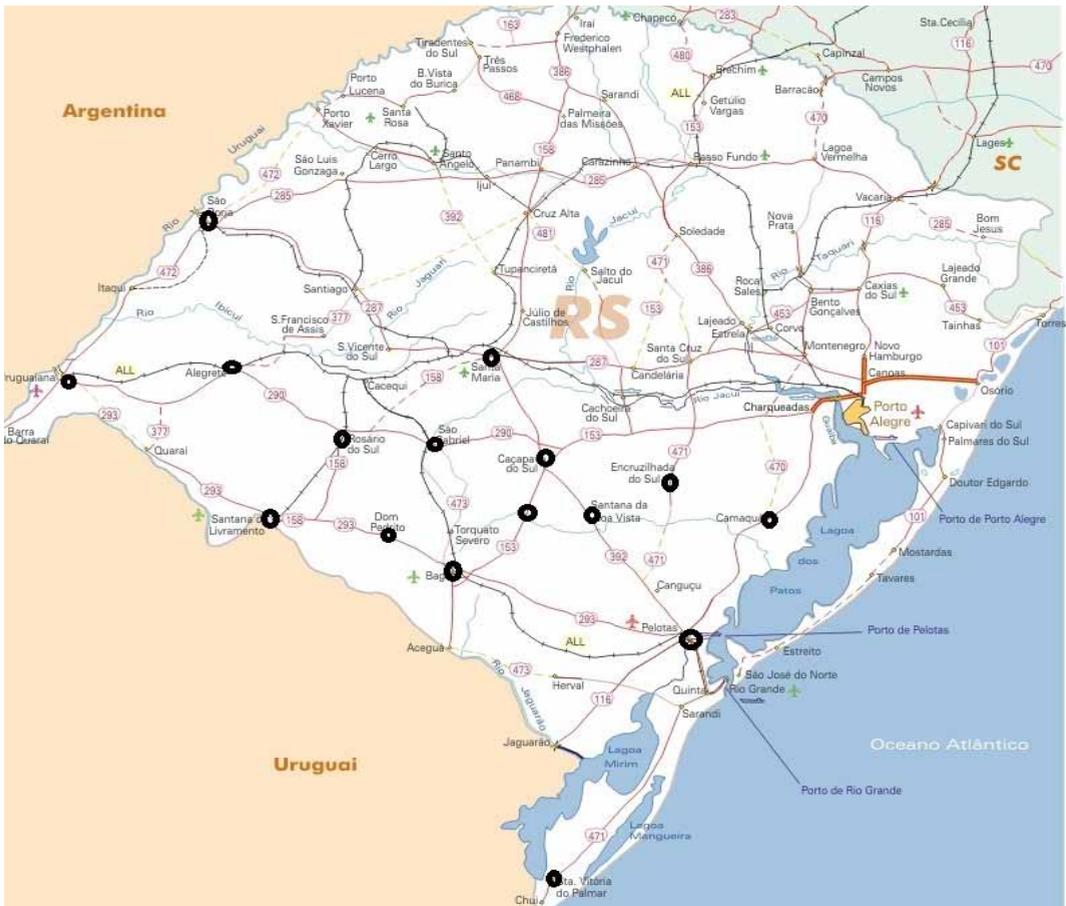
According to a survey about 19.2% of the Brazilian population appreciates the countryside for holidays (*MTur/Vox Populi, 2009*, cited by Ministério do Turismo, 2010, p. 27). The segment is characterized as between 20 and 55 years old, including couples with children, with mid/high level education, typically travelling by car in a range of up to 150 km from the urban residence for week-end or short-breaks. They make travel arrangements via internet, appreciate typical food and handicraft and are mainly attracted by the rural landscape and way of life (Ministério do Turismo, 2010).

3. The study of agro-tourism in Rio Grande do Sul

3.1. Methodology

The present study tries to assess agro-tourists’ profiles and motivations, from the point of view of owners of rural tourism properties in the state of Rio Grande do Sul, approaching in a larger phd research project the rural tourism phenomenon looking at the evolution of rural tourism in this state, from the perspective of the owners of these establishments, their motivations to engage in the activity, their views regarding its impacts and also reasons for their eventual closing of the tourism business (...ref tese Eurico). The phenomenon was thus analyzed from the supply side perspective, concretely with in-depth interviews undertaken with the owners of all properties identified in 4 different moments in time, in a census approach, over 15 years: 9 rural tourism properties existing in 1997/1998; 43 properties in 2002/2003; 52 properties in 2005/2006; and 70 properties identified in 2011, all located in the Southern Half of Rio Grande do Sul. That is, the present study is singular in addressing all rural tourism units in a particular region (census) in a longitudinal approach over a 15 years period, resulting in a total of 174 responses in total (distributed over the four periods of time as

Figure 1 - The location of properties approached in the census 2011.



indicated above). For identifying these units the homepage of the Secretary of State of Rio Grande do Sul was used and all properties previously contacted. Some of the properties contacted had been permanently or temporarily closed down (namely 23% in 2002/ 2003; 27% in 2005/ 2006 and 43% in 2011, in respect to the previous period of study), while others had initiated the business, so that responses are not necessarily from the same owners over time. However, we consider that they should reflect a pattern of responses revealing indices of an evolution of the market, its features, motivations and dynamics.

The motivation of most farmers investing in agri-tourism was the search of additional income for economically stimulating the property and sometimes for being able to keep it and maintain the family together on the farm, with also an interest in socializing of farmers with visitors observable, an awareness of the scenic beauty

and cultural values of the properties, while particularly in recent years increased tourist demand is referred to as a motivation to open an agri-tourism business. These businesses are typically of small scale (although the percentage of those offering between 1 and 5 rooms has decreased from 62.5% in 1997/98 to 37.8% in 2011, with the second most relevant category being between 6 and 10 beds and a very small number offering more than this). However, it must be noted that also a relevant number of agri-tourism units have closed down in this period, mainly due to unsatisfactory results (too few tourists, too little income given the investment) or due to difficulties in matching tourism with other activities, agriculture and family life and in having sufficiently skilled human resources available.

The main survey was administered directly by the second author, in an interview format. This very time consuming procedure (the properties

where located in very disperse and not easy to reach places in a territory of about 154.000 km², see figure 1) resulted in particular attention given to each case (typically the researcher stayed for some hours and sometimes he had to stay overnight) and yielded a good understanding of each case's context, permitted field observations (regarding the surroundings and specificities of the unit), supported by photographic registers. It also led to a high response rate (all those contacted responded, however not necessarily to all questions), permitted explanations of some questions and the recording of also open-ended questions, which frequently are left unanswered in an indirect mailing approach.

The questions were specifically elaborated for this research project yielding an understanding of the owner's profile, motivations to invest in tourism, the rural tourism product presented, management of the tourism activities, but also the profile and motivations of tourists visiting the units, from the owners' perspective, given the close contact between hosts and guests. Both closed-ended and open-ended questions were used, the former permitting direct statistical treatment, the latter requiring transcriptions, content analysis, categorization of responses to also permit some statistical analysis.

The choice of the property owner as respondent and not of the tourist is due to the main interest of the phd research project being an understanding of the way tourism is implemented in a working farm, thereby addressing the farm owners. On the other hand, however interesting, it should be practically impossible to obtain both a census of owners and a representative sample of tourists visiting each unit, given the direct administration approach (units were geographically dispersed and tourists not always present at the time of the researcher visiting the unit). Still, in the present article this indirect assessment of tourist motivations must be recognized as a limitation, however attenuated through the fact that most of them had close contact and frequent talks with their (many of them loyal) guests, making them knowledgeable about their guests' profile.

Considering that Porto Alegre, the capital of Rio Grande do Sul, is the State's main population center, the distance of each unit from this city was calculated, this being a relevant determining factor for visitation. Most rural tourism properties are located at a distance of between 301 and 500km of the capital (61.4%), while 37.1% are located between 100km até 300km from Porto Alegre. According to Zimmermann (1996) and Ministério do Turismo (2010), rural tourism is mostly demanded by people coming from a distance of up to 150km,

suggesting a most relevant proximity market, while the present study also reveals a market of longer distances.

3.2. Survey results

3.2.1. The clients' profile

The large majority of clients of agro-tourism units are reported to be in the age classes between 29 and 64 years, with the age distribution apparently more equilibrated in the last year of data collection (2011), when apart from this largely dominating group (mentioned by 90% of owners), increasingly also children, adolescents, young adults (up to 28 years) and senior tourists (above 65 years) were mentioned, when compared with previous periods of analysis. Owners identified as main professional occupations liberal, scientific professions, medical doctors and lawyers, revealing a predominantly high socio-economic status of visitors. The impression some owners retain from their clients is expressed in the following discourses: *"they come with luxury cars, appreciate the [transitory] change from city to the farm life and say they will come back"*. They tend to identify most clients as *"people with money"*.

Table 1 shows that rural tourism properties in Rio Grande do Sul attract predominantly families with children, however with a slightly diminishing trend since 2002. Properties seem particularly attractive for families, offering packages with all meals included, permitting a contact with animals that city children only know from books, space for them to run and play freely, amongst other features. A second outstanding tourist group are friends, this being an apparently increasingly important client segment since 2002, which is also true for trips with the "entire family".

Visitors come mainly from urban areas within the region of the establishment (44,4%) or from larger distances within the state of Rio Grande do Sul (66.7%), with some flows observable from outside the federal State (38,9%) and even from outside Brazil (19,4% mainly Uruguay and Argentina), with the same amount being observed for the closest, the municipality level. One owner states that *"we have already welcomed visitors from Australia, Germany, EUA and Japan."* However, the here studied agro-tourism reality seems to be mainly a domestic phenomenon.

These numbers (with multiple responses) refer to 2011 and show a relative increase since 2002 in the categories "regional" and "from another federal State". It is interesting to note that the very close market does, in fact, not adhere as much to the existing rural tourism offering, while the attraction

Table 1. Clients of rural tourism properties.

| | 2002-2003 | | 2005-2006 | | 2011 | |
|---------------------------------|-----------|-------|-----------|-------|-------|-------|
| | Freq. | Perc. | Freq. | Perc. | Freq. | Perc. |
| Spouse and children | 26 | 89,7 | 29 | 85,3 | 25 | 78,1 |
| Spouse/partner | 8 | 27,6 | 9 | 26,4 | 7 | 21,9 |
| Friends | 3 | 10,3 | 4 | 11,8 | 7 | 21,9 |
| Single parent with children | 2 | 6,9 | - | - | - | - |
| Grandparents with grandchildren | - | - | 2 | 5,9 | 1 | 3,1 |
| Entire family | - | - | 2 | 5,9 | 4 | 12,5 |
| Honeymoon couples | 1 | 3,4 | - | - | - | - |
| N° respondents | 29 | - | 34 | - | 32 | - |

* **multiple response**

Source: survey of agro-tourism owners in Southern Rio Grande do Sul

Note: several responses possible

over longer distances seems to be quite common. As one agro-tourism owner explains, “*mostly people do not complain about the distance from the (state) capital (where most of his clients come from), they come and feel at home here*”. Similarly, another owner states: “*even coming from far away, they like to come to this place*.” However, one referred to “*some say they would come more often, if it was closer (to their place of residence)*”.

Table 2 reveals that the vast majority of clients stay between one and two nights (67,6%, in 2011), with an apparently increasing tendency towards this short break stay. The second most relevant visitation type is that of just one day (32,4%), the cheapest option, while only 10.8% (in 2011) are

identified as clients staying between 3 and 4 nights. These is related, for once, to a weekend short-break pattern of rural tourism in Rio Grande do Sul, where most do apparently not consider the rural tourism experience interesting enough for a longer stay. Some also only pass by, visiting farms as a tourist attraction for the same day, as mentioned by one owner: “*Sometimes they come with a group of elderly, in an (organized) excursion, they spend the day here and leave again*.” The units are also sometimes used, for convenience, on the way to another destination.

Additionally, several owners identify a particular seasonality of tourist flows: “*In summer, they go to the beach, we have more demand in winter*” or

Table 2. Length of stay of clients in rural properties

| Length of Stay | 2002-2003 | | 2005-2006 | | 2011 | |
|---------------------------|-----------|-------|-----------|-------|-------|-------|
| | Freq. | Perc. | Freq. | Perc. | Freq. | Perc. |
| One day visit | 8 | 25 | 12 | 31,6 | 12 | 32,4 |
| 1 to 2 nights | 19 | 59,4 | 19 | 50 | 25 | 67,6 |
| 3 to 4 nights | 6 | 18,8 | 11 | 28,9 | 4 | 10,8 |
| Total number of responses | 32 | - | 38 | - | 37 | - |

Source: survey of agro-tourism owners in Southern Rio Grande do Sul

Note: several responses possible

Table 3. Motives for visiting rural tourism properties in Southern Rio Grande do Sul

| Tourist motivations | 2002-2003 | | 2005-2006 | | 2011 | |
|--|-----------|-------|-----------|-------|-------|-------|
| | Freq. | Perc. | Freq. | Perc. | Freq. | Perc. |
| Nature | | | | | | |
| Proximity to nature | 12 | 37,5 | 5 | 14,3 | 2 | 5,6 |
| Proximity to nature/freedom for children | 3 | 9,4 | | | | |
| Culture | | | | | | |
| Learning about the animals | 7 | 21,9 | | | | |
| Learning about the farms | 2 | 6,3 | 2 | 5,7 | | |
| Learning about local/regional culture | | | 4 | 11,4 | 16 | 44,4 |
| Gastronomy | 2 | 6,3 | 1 | 2,9 | 1 | 2,8 |
| History | 1 | 3,1 | 3 | 8,6 | | |
| Social | | | | | | |
| Be together with children | 2 | 6,3 | | | | |
| Socialize with owners | 2 | 6,3 | | | | |
| Hospitality/Service context | | | | | | |
| Private environment | 1 | 3,1 | 1 | 2,9 | | |
| Personalized service | 2 | 6,2 | 1 | 2,9 | | |
| Recreational | | | | | | |
| Fishing | 1 | 3,1 | | | | |
| Differentiated program | 2 | 6,3 | 2 | 5,7 | | |
| Horse riding | 3 | 9,4 | 3 | 8,6 | | |
| Entertainment | 1 | 3,1 | 1 | 2,9 | 1 | 2,8 |
| Relaxing/escape from city stress | | | | | | |
| Peace and quiet | 15 | 46,9 | 4 | 11,4 | 1 | 2,8 |
| Rest | 6 | 18,8 | 2 | 5,7 | 3 | 8,3 |
| Quality of Life | 1 | 3,1 | | | | |
| Physical wellness/Health | 3 | 9,4 | 7 | 20 | 8 | 22,2 |
| Self development | | | | | | |
| Self development | | | 1 | 2,9 | 2 | 5,6 |
| Freedom | 1 | 3,1 | 1 | 2,9 | | |
| Emotional | | | | | | |
| Nostalgia | | | 4 | 11,4 | 10 | 27,8 |
| My roots | 7 | 21,9 | | | | |
| Convenience | | | | | | |
| Proximity to urban center | 1 | 3,1 | 1 | 2,9 | | |
| Safe roads | 2 | 6,3 | | | | |
| Ease of access | 1 | 3,1 | | | 1 | 2,8 |
| Safety | 5 | 15,6 | 1 | 2,9 | | |
| Other | | | | | | |
| Particular motives | | | 3 | 8,6 | 5 | 13,9 |
| Like the place | | | 3 | 8,6 | | |

Source: survey of agro-tourism owners in Southern Rio Grande do Sul

Note: several responses possible

“when there is a public holiday, particularly close to the weekend, I am out-booked, I could host more people, if I had so many rooms, but there are also times nobody comes.”

On the other hand, many clients are remarkably loyal, coming back to the visited rural tourism property (86,5%, in 2011), typically once or twice a year, some even three to four times, but others never return. This behavior (that has not changed much since 2002) reflects the preference for several short breaks along the year in the countryside over a longer holiday stay. The following statement of one owner exemplifies this pattern: *“they come for little time, but they like this rural environment, and like to come back”*. One owner of a farm providing horse riding says: *“the kids (in the tourist group) always want the same horse”*, revealing a particular type of loyalty, interestingly including loyalty to certain farm animals, or a certain type of place attachment, which is in fact close to place dependence, referring to a set of social and physical features that meet the individual’s specific needs and permit desired activities and represent what is unique in the place, differentiating it from any other alternative one (Bricker & Kerstetter, 2000; Silva et al, 2013).

3.3. Tourists’ motivations

Owners of rural establishments were asked about their clients’ main specific motivations, leading to a large number and variety of responses which are presented and categorized into the following broad categories, as derived from the literature review (see section 2.2.). The responses to the open-end questions are naturally varied and make a comparison over time difficult (see Table 3).

Relaxation in a quiet and peaceful environment as a general motivation of most rural tourists, identified in many studies on the respective market, is also important here, but has apparently lost its relevance, although it may just be named differently in the study undertaken in 2011, where people refer to a more holistic wellness and health motive, which should indeed be partly related to relaxation, but can also assume more active pursuits. So it is worth of notice that just relaxation may indeed not be the outstanding motivation any more, being increasingly associated to a broader view of a healthy, balance providing and emotionally colored experience, which is simultaneously culturally enriching.

So, even if some *“may come just to relax and enjoy the peace and quiet”*, *“they want to get away from the city”*, *“eventually reading books and not doing anything else”*, others refer to visitors *“liking*

to participate in rural activities”, *“providing their children a contact with farm and domestic animals they do not have in the city”*, enjoying *“walking on the trails in the property”*, especially through forested nature areas, appreciating *“swimming in a pool in the middle of the countryside”*, and many being interested in *“horse riding”*, being also a frequently mentioned motive for coming back (and riding the same horse).

Agro-tourism units close to the border to Uruguay also refer to an interest of clients in *“shopping in Uruguay”*. This emphasis on diverse “particular motives” points at new, eventually more diversified patterns of tourist motivation, making a classification and a homogenous description of “the rural tourist” highly questionable.

When asked about the reasons about visitors’ loyalty to their property, owners of rural tourism units understand that their clients tend to come back, mostly due to the fine hospitality, the personalized way they are welcomed at the property, generally in a family ambiance: *“They like the way we treat them here, they feel truly welcome”*, as one owner puts it. But owners also understand the importance of the specific features of their properties and surrounding environment, making people *“attached to the place”*, by providing the ideal context for seeking close contact to nature in the rural tourism property and the associated health benefits (“pure air”) tourists seek, while others refer to the attractions/ activities available at the properties, with gastronomy and horseback riding particularly standing out. Also a general escape from stress is a frequently mentioned underlying motive again in responses to this question, confirming studies in other contexts (Sidali & Schulz, 2010; Kastenholtz et al., 2012; Lane, 2009; Molera & Albaladecho, 2007; Silva, 2009). Some also refer to the particular location, the liking of the region the property is integrated in, as a reason to come back, while others refer even to animals, some clients (or their kids) get affected to, as mentioned before, all creating loyalty, place attachment and sometimes even place dependence (Silva et al, 2013).

When asked about activities sought by clients, owners refer to horse riding as the most outstanding activity (however slightly declining since 2002), and to swimming in swimming pools (slightly increasing in relevance). Other most sought activity opportunities are hiking on ecological trails (showing an increasing trend) and observing/ participating in agricultural activities (e.g. milking cows, observing animal vaccination, harvesting, etc., another increasing trend). Also rustic playgrounds, football and volleyball grounds and river beaches/ waterfalls are highly appreciated. Owners are able to number a large variety of different specific activities revealing

a vast range of recreational, cultural/ educational and sportive activities/ facilities, confirming the idea of rural tourists being increasingly active and motivated by distinct interests, eventually also due to the fact that they often come with family and friends, i.e. in groups composed of individuals with distinct interests. Frequently, families visiting rural properties are quite heterogeneous, with parents sometimes nostalgically returning to their rural origins, while their children only know city life. The wish to show their children life in a rural area, presenting them with their original family background is oftentimes an important motif for the visit, but owners have understood that for the children, so used to urban life, they need to present other kinds of attractions to make them also enjoy their stay in the rural property.

The variety of opportunities presented reveals the owners' capacity of developing new products/ attractions, based on existing natural and cultural resources, as well as on their own investment in facilities they understand to be attractive to tourists, i.e. revealing some level of entrepreneurship, capacity to adapt to market needs, which may be one important reason for the high levels of loyalty obtained from their clients. As a matter of fact, the recreational activities suggested are not exclusive neither necessarily related to agriculture or the countryside, like swimming pools, sports facilities or even saunas, which are mostly signs of an adaptation to the urban visitors' tastes.

4. Conclusions

In the Southern Half of Rio Grande do Sul there is an intense debate about the role and future of agro- and rural tourism, which should be based on a sound knowledge of the phenomenon. The main goal of the here presented study is to shed light on rural tourism in this region, considering its evolution overtime and looking here, particularly, at the property owners' perception of this market, in terms of profile, motivation and travel behavior. Many owners seem to be successful in attracting and creating a loyal client base by matching the needs and desires of a generally well educated, professionally active, urban couples and families, coming for short breaks of typically 1 or 2 nights, frequently several times a year. Hospitality and the special, familiar welcoming of clients seems to be relevant for coming back, confirming Avena's (2001) emphasis on the warm, personalized service context as a particularly sought dimension of rural tourism, probably in contrast to the anonymous city life and standardized hotel comfort provided in other tourism contexts (Kastenholz & Sparrer,

2009). This, plus perceived unique features of the property, where even the attachment to animals plays a role, but also way the property provides the opportunity to relax from stressful city life in a natural, healthy environment, on the one hand, and to engage in certain activities (including agricultural) and experiences (including learning experiences), create loyalty to the unit, but also place attachment and even place dependence (Bricker & Kerstetter, 2000; Silva et al, 2013).

The here identified relevance of a health/ wellness motive associated to nature corroborates results of a study undertaken by Hanai in Minas Gerais about the rural tourist market: "*The majority of tourists visits these nature areas [...] motivated by the contact with preserved nature, seeking tranquility, peace and quiet, relaxation and an escape from the daily routine and stress*" (2009, p.110). It further confirms an apparently global trend of urban populations seeking to escape the city transitorily, as found in other contexts (Kastenholz et al., 2012; Lane, 2009; Molera & Albaladecho, 2007; Sidali & Schulze, 2010; Silva, 2009). However, one important finding of the present study is the fact that most owners do not refer as frequently as before the single motivation "relaxation", a typical escape motive, but instead suggest increasingly a more holistic health/ wellness motive, which would naturally include relaxation from stress, while also implying more active pursuits, as also observable in the trend towards more activities mentioned and towards the increasingly emotion-rich experience sought.

This may confirm a general trend within tourism demand, the post-modern tourist being frequently suggested to be more open to new and different experiences, interested in getting involved and valuing the emotional outcome of the holidays, which may, indeed apply perfectly to rural tourism experiences (Kastenholz et al, 2012; Walmsley, 2003).

Additionally, specific attractions/ activities available at the properties, particularly related to gastronomy and horseback riding are other important motives for rural tourism in Rio Grande do Sul, but also opportunities to get to know and get involved in agricultural and traditional activities, and sometimes learning about local/ regional history and culture, confirming results of Ribeiro et al's (2012) study. There seems to be a need to present a balanced offer, based on highly valued endogenous natural and cultural resources, but also including more urban-like recreational facilities, permitting diverse opportunities for multi-motivated tourists seeking emotionally involving experiences, in a safe, relaxing, healthy and welcoming environment. This multi-motivational rural tourism demand should also

be due to the fact that many hosts come in groups with diverse family members, sometimes with friends, individuals with distinct interests and preferences, a varied offer would best adapt to.

Owners interviewed in this survey, particularly those who maintained their unit open and eventually also increased their (still small-scale) offer of accommodation, show this capacity of providing satisfactory rural tourist experiences making clients come back several times a year. However, not all have succeeded and even decided to close down their business, due to lack of profitability and difficulty of adaptation to this type of market and activity (quite different from agriculture), while those who keep the business, apparently have not succeeded yet in changing the pattern of the weekend short-break to a longer holiday stay, eventually requiring additional management and marketing efforts, since longer stays should help contribute to more sustainable rural tourism development, as well as to more involving and significantly recalled experiences and richer host-guest relationships, for both visitors and visited alike (Kastenholtz et al, 2013).

It is noteworthy that some of the motives and trends reveal a real opportunity for farm owners in Brazil diversifying into tourism and able to provide not only a genuine welcoming atmosphere, but also diverse experiences based on endogenous resources, local food and its traditional preparation, on the local nature environment, which may be additionally prepared for leisure and sports activities (especially hiking and swimming), the maintenance of animals, particularly horses (for horse riding), to increase their income through tourism services, while simultaneously enhancing local farming produce, especially food production (not only for consumption during the stay, but also for selling directly to the hosts as souvenirs). This type of tourism, even if to a certain degree adapted to the taste of the urban guests, is also likely to enhance the maintenance of local traditions, which are valued by visitors, as unique and different from the standardized urban way of life. All this, plus the opportunity of enjoying increased social contacts and thereby overcoming the relative isolation of living in rural areas, as highlighted by Kastenholtz et al (2013) for village populations in Portugal, the local residents' quality of life may indeed be enhanced, possibly leading farmers and their families to stay in areas, which are sometimes perceived as less attractive for living. Consequently, all this implies a large potential of sustainable rural tourism development in the here studied Brazilian farms, contributing to farm families' economic survival, to continued agricultural

activities, which also benefit from tourism while simultaneously benefiting it, to landscape and heritage preservation and to their setting into value, also enhancing local culture and sense of identity (Bramwell & Lane 1993; Kastenholtz, 2004; Saxena et al, 2007).

In any case, the here presented results are perceptions of agro-tourism promoters and should be complemented by a survey of tourists visiting these units, however difficult the implementation of such a study. With a sufficiently large and representative sample, also a cluster analysis could be undertaken, helping identify segments seeking distinct benefits in the Brazilian rural areas and correspondingly improve the units' and destination's capacity of developing well-adapted products to carefully selected markets (Kastenholtz, 2004; Frochot, 2005).

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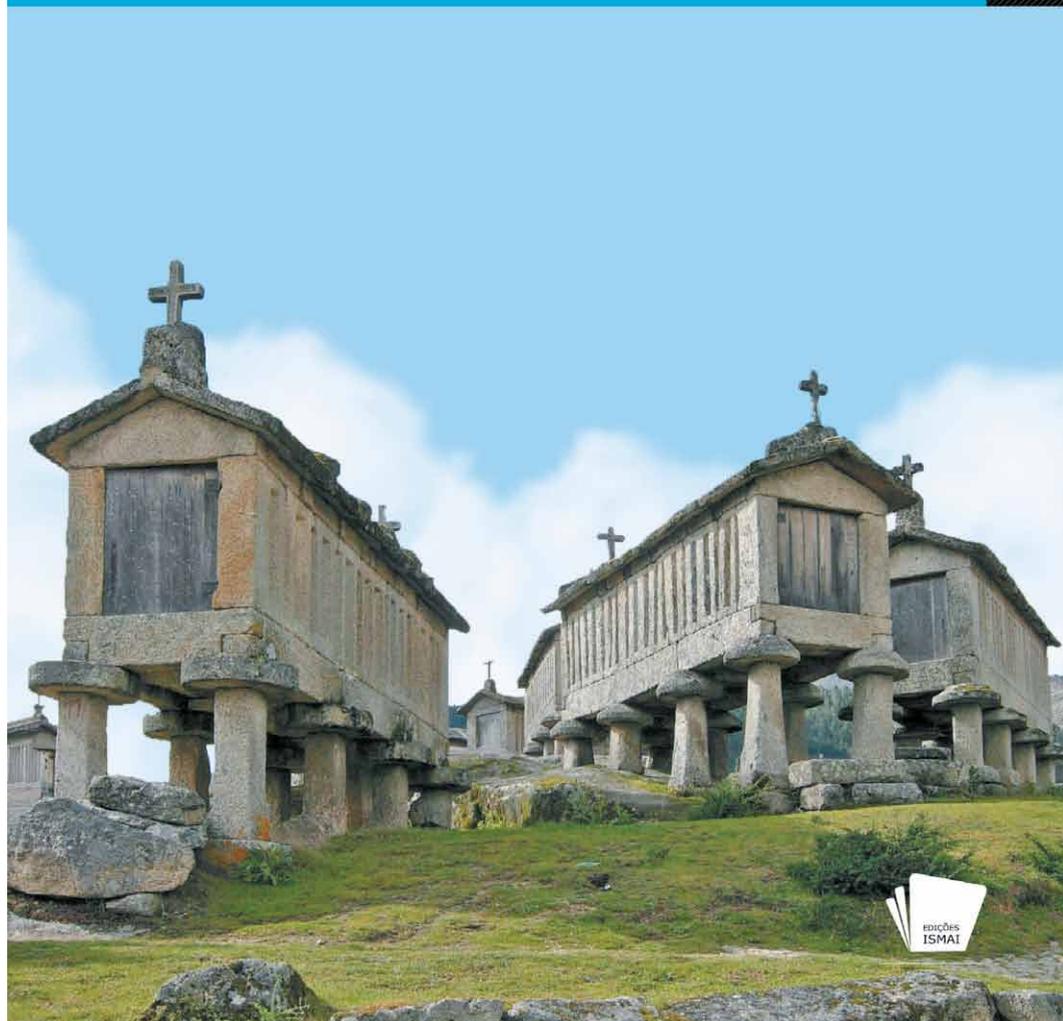
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Um contributo do marketing sensorial para o marketing da experiência turística rural.

A contribute to sensory marketing rural tourist experiences

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Resumo: A importância dos cinco sentidos humanos – visão, audição, olfato, paladar e tato – no marketing de experiências turísticas positivas, únicas e memoráveis tem vindo a ser enfatizada no âmbito da investigação em turismo. Particularmente, a riqueza multissensorial e a vulnerabilidade dos recursos endógenos existentes nas áreas rurais, com características divergentes do ambiente urbano e potenciadoras de atividades ligadas à natureza e aos ativos rurais, justificam um marketing da experiência turística adequado ao desenvolvimento sustentável das áreas rurais. Considerando o contributo do marketing sensorial para o design de um ambiente potenciador de experiências turísticas desejáveis e para a segmentação de turistas, o presente trabalho pretende refletir sobre o papel dos cinco sentidos no marketing de experiências turísticas que reforcem o desenvolvimento sustentável dos destinos rurais.

Palavras-chave: marketing sensorial, experiência turística, rural, cinco sentidos, marketing turístico

A contribute to sensory marketing rural tourist experiences

Abstract: The role of the five human senses – sight, hearing, smell, taste, and touch – in the marketing of positive, unique, and memorable tourist experiences has recently been in focus in tourism studies. Particularly, the countryside embraces fragile local resources rich in multisensory effects, which diverge from urban environment and are related to nature and rural life, which could be explored in the marketing of tourist experiences suitable for sustainable local development. Considering the contribute of sensory marketing to the process of staging the environment for desired tourist experiences to emerge and to the segmentation of rural tourists, this study intends to emphasize the role of the senses in the marketing of tourist experiences which potentiate sustainable rural development.

Key Words: sensory marketing, tourist experience, rural, five senses, tourist marketing

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1. Introdução

A contribuição dos sentidos para o conhecimento humano tem sido um tópico de reflexão desde os primeiros tempos da filosofia (Aristóteles, 2001; Platão, 2003), sustentando igualmente abordagens filosóficas mais recentes (Merleau-Ponty, 2002). Na linha das mudanças ocorridas no paradigma da investigação em psicologia no século XX, estudos empíricos conduzidos na perspetiva fisiológica da perceção humana têm evidenciado a importância dos sentidos na construção do significado do ambiente externo aos indivíduos (Damásio, 2009, 2010; Gibson, 1966; Goldstein, 2010; Sacks, 2005). O desenvolvimento da investigação sobre este tópico tem atraído a atenção de outras disciplinas académicas, tais como a sociologia (Dewey, 1934; Fortuna, 2009; Simmel, 1997; Vannini *et al.*, 2011; Veijola e Jokinen, 1994), a antropologia (Classen, 1997; Erlmann, 2004; Howes, 2005); a história (Corbin, 2005; Jütte, 2005; Smith, 2007) ou a geografia (Casey, 1996; Crouch, 2002; Rodaway, 1994; Porteous, 1985; Tuan, 1977), abordando a relação dos sentidos com o corpo social, identidades, experiências dos lugares, culturas e sociedades.

Esta sólida base académica multidisciplinar permitiu atribuir aos cinco sentidos externos – visão, audição, olfato, paladar e tato – um papel crucial no âmbito da perceção e comportamento do consumidor, no seio do paradigma das experiências na era da pós-modernidade (Pine e Gilmore, 1998). De facto, a emergência do marketing sensorial veio dar destaque aos estímulos multissensoriais na facilitação de uma experiência de consumo positiva e memorável, envolvendo o consumidor de uma forma física, intelectual e emocional (Hultén *et al.* 2009; Krishna, 2010; Lindstrom, 2005; Schmitt, 1999; Schmitt e Simonson, 1997). Neste sentido, a literatura aponta para a preferência dos consumidores pelas experiências proporcionadas pelos produtos, diluindo de alguma forma a importância do produto isolado (Holbrook, 1999; Holbrook e Hirschman, 1982; Jensen, 1999).

Neste contexto, o turismo constitui um dos exemplos pioneiros da economia da experiência (Oh *et al.*, 2007; Quan e Wang, 2004; Williams, 2006). Numa perspetiva de marketing e de gestão, a experiência turística pode ser entendida como uma experiência de consumo. Consequentemente, o turista pode ser considerado um consumidor de produtos e serviços (Quan e Wang, 2004; Mossberg, 2007), que por sua vez integram um produto compósito (Otto e Ritchie, 1996). O constructo de *serviscape* (Bitner, 1992) dá lugar ao constructo de *experienscape* (O'Dell, 2005), referindo-se o primeiro às características físicas que envolvem o serviço, influenciando as reações internas e comportamen-

to dos consumidores, enquanto a *experienscape* foca o consumo global do turista num ambiente multissensorial constituído pelo próprio destino (Mossberg, 2007). Embora os estudos turísticos tenham enfatizado sistematicamente a componente visual da experiência turística (Adler, 1989), estudos mais recentes destacam a importância de uma abordagem holística aos cinco sentidos no planeamento e marketing de experiências turísticas (Dann e Jacobsen, 2003; Ellis e Rossman, 2008; Gretzel e Fesenmaier, 2003, 2010; Kastenzholz *et al.*, 2012b; Mossberg, 2007; Pan e Ryan, 2009), apontando a dimensão sensorial como suporte das diferentes componentes das experiências turísticas (Agapito *et al.*, 2013).

Os recursos endógenos existentes nas áreas rurais oferecem múltiplos estímulos sensoriais (Kastenzholz *et al.*, 2012b) considerados vitais na facilitação da cocriação de experiências únicas que atraem visitantes (Mossberg, 2007), permitindo competir mais eficazmente pela sua atenção (Ooi, 2005). Face ao crescimento da concorrência e a um mercado internacional cada vez mais interessado em experiências turísticas autênticas e diversificadas, os destinos e as organizações turísticas rurais devem procurar estratégias criativas e inovadoras no planeamento de experiências turísticas, de uma forma sustentável (Kastenzholz *et al.*, 2012a; Lane, 2009). De facto, os destinos rurais, tradicionalmente considerados mais vulneráveis face aos impactos negativos do turismo ao nível económico, social, cultural e ambiental, requerem uma atenta abordagem de marketing (Lane, 1994). É neste sentido que o marketing sustentável dirige o seu foco para os recursos necessários ao desenvolvimento da oferta (Fuller, 1999), visando a otimização dos benefícios e dos impactos negativos inerentes ao desenvolvimento do turismo (Middleton e Hawkins, 1998). Esta perspetiva pretende contribuir para harmonizar a crescente procura por uma diversidade de experiências turísticas ativas em áreas rurais com os interesses das organizações turísticas e com desejo da comunidade local por um desenvolvimento sustentável (Lane, 1994).

Considerando a importância dos estímulos sensoriais na criação de condições para o *design* de um ambiente onde experiências turísticas desejáveis possam emergir (Agapito *et al.*, 2013; Mossberg, 2007; Oh *et al.*, 2007; Tung e Ritchie, 2011), potenciando a experiência turística rural global (Kastenzholz *et al.*, 2012a) e a adequação do estudo de experiências sensoriais no âmbito da segmentação de turistas rurais (Agapito *et al.*, 2014), o presente estudo pretende refletir sobre o papel dos sentidos no marketing de experiências turísticas positivas, únicas e memoráveis que promovam o desenvolvimento sustentável dos destinos

rurais. Esta reflexão será realizada com base numa revisão de literatura multidisciplinar com foco no planeamento e marketing da experiência turística, em geral, e na experiência turística rural, em particular. Com base no estudo de Agapito *et al.* (2013), exemplos de trabalhos de diversas áreas académicas ilustrarão a importância dos sentidos na percepção humana, com especial ênfase no papel do marketing sensorial nas experiências de consumo. Através do recurso a bases científicas *online*, serão ainda identificados estudos e livros de referência com uma abordagem holística à experiência turística sensorial, com destaque para estudos com uma perspetiva pós-positivista aos cinco sentidos no planeamento e marketing de uma experiência turística rural sustentável.

2. O marketing sensorial da experiência turística rural

2.1. O marketing sensorial e a experiência de consumo

Os cinco sentidos são de vital importância para a experiência da própria existência do indivíduo, considerando que na ausência dos sentidos não seria possível formar impressões acerca do mundo que nos rodeia (Damásio, 2010; Howes, 2005). Os estímulos sensoriais (visuais, acústicos, olfativos, gastronómicos e táteis) desencadeiam sensações (cores, sons, odores, sabores e texturas), que atuam como iniciadoras do processo de percepção, através da ativação dos órgãos sensoriais e da transformação dos estímulos externos em sinais neuronais. A percepção é um requisito para a atribuição de sentido às sensações, influenciando a ação, podendo ser entendida como uma “experiência sensorial consciente” (Goldstein, 2010: 8), derivando de uma “sequência de processos que atuam em conjunto de forma a determinar a experiência da reação a um estímulo presente no ambiente” (Goldstein, 2010: 5). Adicionalmente, os marcadores sensoriais numa experiência de consumo potenciam a memória a longo-prazo, facilitando a fidelização à experiência (Ooi, 2005; Tung e Ritchie, 2011).

Neste contexto, o marketing tem focado a atenção no estímulo dos cinco sentidos como forma de envolver os consumidores, através da criação de condições geradoras de um ambiente onde experiências de consumo desejáveis possam ser vividas (Carù e Cova, 2003; Gentile *et al.*, 2007; Hultén *et al.*, 2009; Krishna, 2010; Schmitt, 1999; Schmitt e Simonson, 1997). O florescimento do marketing sensorial está em linha com a consolidação do paradigma da economia das experiências (Pine e Gilmore, 1998), segundo o qual os consumidores valorizam mais a forma de consumo (hedónica),

do que os produtos e serviços *per se* (Holbrook e Hirschman, 1982). O marketing sensorial pode ser, desta forma, definido como o “marketing que envolve os sentidos, afetando a percepção, a avaliação e o comportamento dos consumidores (Krishna, 2012: 332), atuando na clarificação da identidade e imagem das marcas. Esta perspetiva é consolidada por recentes avanços na área da neurociência, que têm contribuído para desenvolvimentos na área da psicologia do consumidor (Plassmann *et al.*, 2012), encorajando novas abordagens, como é caso do neuromarketing (Zurawicki, 2010), ou da endocrinologia comportamental (Derval, 2010), ambas enfatizando a componente de gestão dos estímulos sensoriais.

Enquanto se reconhece a multidimensionalidade da experiência de consumo, que envolve os indivíduos de uma forma holística e consistente a diferentes níveis (Gentile *et al.*, 2007), estudos empíricos na área do marketing mostram o papel fundamental da componente sensorial, quando comparada com as diferentes componentes da experiência de consumo. Assim, Brakus, Schmitt e Zarantonello (2009) concluem que a dimensão sensorial é a que mais se destaca em relação à experiência com a marca quando comparada com as dimensões cognitiva, afetiva, social e comportamental. Na mesma linha, Gentile *et al.* (2007) revelam que o valor associado à componente sensorial é significativamente mais elevado quando comparado com as componentes emocional, cognitiva, pragmática, relacional e estilo de vida, no contexto da cocriação de valor com o consumidor.

2.2. Os cinco sentidos e a experiência turística

O termo *sensescape* foi conceptualizado pelo geógrafo Porteous (1985), tendo como base a relação indivíduo-corpo-lugar. Ao adicionar à noção de *landscape*, comumente associada a paisagens visuais, a ideia de que outros sentidos podem ser espacialmente organizados e associados a lugares, o autor sugere a existência de distintas paisagens auditivas, olfativas, gastronómicas e táteis (Dann & Jacobsen, 2003; Fortuna, 2009; Pan e Ryan, 2009; Urry, 2002). Neste sentido, múltiplas experiências sensoriais podem ter lugar em encontros geográficos (Rodaway, 1994), como é o caso das experiências de destinos turísticos (Agapito, 2013; Crouch, 2002). Apesar do facto de os estudos turísticos terem vindo a focar a componente visual da experiência turística, pesquisas mais recentes propõem uma abordagem holística aos cinco sentidos no âmbito do planeamento e marketing da experiência turística (Agapito *et al.*, 2013; Dann & Jacobsen, 2003; Govers *et al.*, 2007; Gretzel e Fesenmaier, 2003; Kastenholz *et al.* 2012a, 2012b; Pan e Ryan, 2009).

Nesta linha, os modelos da experiência turística enfatizam a importância da visão, da audição, do olfato, do paladar e do tato no *design* de uma experiência turística de qualidade. Os estímulos sensoriais integram os fatores externos que influenciam a percepção das experiências turísticas e que podem ser parcialmente desenhadas e coordenadas em torno de um tema que facilite a integração da oferta experiencial e que contribua para o alcance de *outputs* positivos, tais como emoções positivas, satisfação, memória de longo prazo e fidelização ao destino (Agapito *et al.*, 2013; Cutler e Carmichael, 2010; Ellis e Rossman, 2008; Larsen, 2007; Mossberg, 2007; Oh *et al.*, 2007). Especificamente, os estímulos sensoriais são fatores ambientais que compõem o espaço físico ou virtual onde o consumo de produtos (tangíveis e intangíveis) tem lugar (Bitner, 1992; Neuhofer *et al.*, 2012), sendo ainda apontados por alguns autores como facilitadores das relações sociais (Walls *et al.*, 2011).

2.3. Os estímulos sensoriais no marketing da experiência turística rural

Um marketing atento da experiência turística rural deve centrar-se na criação de um ambiente onde experiências intensas, positivas e memoráveis tenham lugar, procurando alcançar equilíbrio na preservação dos recursos locais, na qualidade de vida dos residentes, na qualidade da visita dos visitantes e nos benefícios para as diferentes organizações turísticas, contribuindo assim para o desenvolvimento sustentável local (Kastenholz *et al.*, 2012a; Lane, 1994; Manente e Minghetti, 2006). De facto, considerando a complexidade inerente ao próprio conceito de turismo rural (Lane, 1994; Roberts e Hall, 2001), a experiência turística rural pode ser conceptualizada como uma “realidade complexa vivida por turistas e residentes, constituída por recursos locais e infraestruturas, assim como por uma oferta específica de turismo rural, coordenada por uma organização de gestão/marketing do destino, no seio de um sistema lato de forças económicas, culturais e sociais” (Kastenholz *et al.*, 2012a: 248). Neste contexto, o marketing de experiências turísticas rurais deve ter em conta as oportunidades existentes para todos os *stakeholders* em participarem ativamente na cocriação de experiências turísticas do destino, de qualidade (Jennings e Nickerson, 2006; Kastenholz *et al.*, 2012b).

As áreas rurais são reconhecidas por reunirem uma coleção de recursos naturais (vegetação, solo, fauna, recursos hídricos e paisagens naturais), por estarem ligadas a valores culturais relacionados com o artesanato, a gastronomia e tradições locais, por tradicionalmente se associarem à agricultura

e, ainda, à pesca, no caso das áreas rurais costeiras (Roberts e Hall, 2001). Todas estas características, que contrastam com os ambientes urbanos, são valorizadas e constituem motivo de atração de turistas para os destinos rurais, quer por representarem o idílico rural, quer por possibilitarem atividades diversificadas ao ar livre (Butler *et al.*, 1998; Lane, 1994). Como resultado, as áreas rurais oferecem não apenas estímulos visuais ricos, mas efeitos multissensoriais únicos que podem ser experienciados pelos turistas e, conseqüentemente, geridos pelo destino de forma a intensificar a experiência global do visitante, envolvendo os diferentes *stakeholders* (Agapito, 2013; Kastenholz *et al.*, 2012a, 2012b).

2.4. Os temas sensoriais no marketing da experiência turística rural

No âmbito do turismo rural, a literatura identifica alguns temas relacionados com imagens que tradicionalmente as populações urbanas associam às áreas rurais. É o caso das paisagens intocadas pelo homem, dos refúgios pastorais, do tradicional idílico, dos estilos de vida autênticos, dos ambientes nostálgicos, e da proximidade à natureza (Butler *et al.*, 1998). Numa perspetiva de marketing, um tema central é a ideia que sobressai da narrativa que está a ser comunicada (Moscardo, 2010), ou seja, o conceito a partir do qual a experiência do consumidor é coerentemente organizada, interligando diversos produtos e serviços (Pine e Gilmore, 1998). Reconhece-se, no entanto, que as áreas rurais têm continuamente sido transformadas em espaços de consumo em oposição a espaços de produção. A agricultura tem perdido gradualmente o seu papel dominante, as estruturas sociais têm conhecido uma mudança dinâmica (Roberts e Hall, 2001) e novos perfis de turistas começaram a procurar as áreas rurais para as suas férias. Este fenómeno tem resultado na procura de diversas experiências por parte dos turistas não apenas centradas na ruralidade, assim como na existência de uma diversidade de percepções dos destinos rurais com base na multiplicidade de recursos existentes (Kastenholz *et al.*, 1999). Este fenómeno justifica a relevância do estudo dos temas percebidos pelos turistas no âmbito da sua experiência, com objetivos de marketing.

A identificação de temas através de informação sensorial associadas aos destinos, com base na experiência turística, tem sido explorada tanto a nível académico (ver seção 2.5), como a nível prático, como é o caso da Aldeia da Pedralva. Coexistindo com sete dos habitantes originais e três residentes estrangeiros, foi inaugurado um projeto de turismo de aldeia¹ na Aldeia da Pedralva, em 2010, com especial foco em experiências de natureza (*biking, fishing, trekking, birdwatching, hiking e surfing*),

beneficiando dos recursos naturais da envolvente do Parque Natural do Sudoeste Alentejano e Costa Vicentina e das praias circundantes do concelho de Vila do Bispo, no sudoeste de Portugal (<http://www.aldeiadapedralva.com/>). Neste sentido, a identidade da marca da Aldeia da Pedralva foi construída a partir da representação dos cinco sentidos. O logótipo consiste num olho rodeado por elementos relacionados com os sentidos da audição, tato, paladar e olfato. O projeto tem como pressuposto que a estada numa aldeia de turismo rural e o envolvimento com os recursos endógenos, a comunidade e as organizações locais desencadeiam sensações e experiências únicas. Por exemplo, os programas de *trekking* apresentam roteiros temáticos, integrando diferentes cenários como escarpas, bosques, planícies, dunas e grutas rochosas, correspondendo a diferentes tipos de fauna, flora e geologia. Atendendo ao facto de que muitos dos recursos são endémicos à região, o objetivo é criar condições para que os visitantes vivam experiências com base em atmosferas visuais, sons, texturas, cheiros e sabores únicos, de uma forma sustentável (Agapito *et al.*, 2012).

2.5. Os estudos empíricos no marketing da experiência sensorial turística rural

Estudos empíricos que adotam uma perspetiva de gestão e seguem uma metodologia mista para analisar experiências sensoriais turísticas demonstram que temas sensoriais podem ser identificados através da articulação de impressões sensoriais (Agapito *et al.*, 2014; Gretzel e Fesenmaier, 2003, 2010; Pan e Ryan, 2009). Numa primeira fase, estes estudos sugerem o recurso a uma análise de conteúdo de experiências sensoriais reportadas por turistas, através do uso de questões abertas em questionários ou de *blogs* de viagens, por exemplo. A segunda fase corresponde a uma análise multivariada (exs. análise de correspondências múltiplas ou análise fatorial) das categoriais sensoriais codificadas a partir da análise de conteúdo, permitindo uma interseção das impressões sensoriais de forma a identificar temas. Esta análise possibilita ainda o cruzamento das variáveis sensoriais com outras variáveis relacionadas com o perfil do turista, permitindo associar diferentes temas sensoriais a diferentes perfis, com recurso a uma análise *cluster*, por exemplo.

Gretzel e Fesenmaier (2010) desenvolveram o *Sensory Experience Elicitation Protocol* aplicado sob a forma de um questionário com questões abertas. O objetivo da metodologia é analisar informação que não é facilmente acessível ao consumidor, como é o caso das experiências sensoriais, e recorrer a amostras de grande dimensão que permitam extrair

temas dominantes adequados ao desenvolvimento de estratégias de marketing dirigidas a segmentos de mercado específicos. Os autores concluem, num estudo desenvolvido num destino rural no norte do Indiana, nos Estados Unidos da América, que informação multissensorial extraída a partir de experiências sensoriais turísticas é adequada à planificação de experiências turísticas com base em temas sensoriais. Numa perspetiva similar, Govers, Go e Kumar (2007) usam uma abordagem fenomenográfica pós-positivista, através de um questionário *online* para obter informação sobre experiências sensoriais de destinos ainda não visitados, em formato de história. O estudo permitiu, assim, a construção de mapas perceptuais relativos à imagem *a priori* dos destinos percebida por potenciais visitantes. Pan e Ryan (2009) identificaram a associação de distintas experiências sensoriais a diferentes destinos da Nova Zelândia. Verificaram ainda os autores que os sentidos não visuais são mais dominantes nos destinos rurais do que nas áreas urbanas, através de uma análise de conteúdo de textos desenvolvidos por jornalistas em *blogs* de viagens, seguida por uma análise de correspondências.

O estudo empírico de Agapito *et al.* (2014) revela, através de um questionário aplicado a turistas que pernoveram em alojamentos de espaço rural da Costa Alentejana e Vicentina de Portugal, que a análise de experiências sensoriais relatadas por visitantes é adequada ao processo de segmentação de turistas e na definição de uma oferta turística com base em experiências multissensoriais. No caso particular em estudo, após uma análise de conteúdo de cinco questões abertas relacionadas com cada um dos cinco sentidos, quatro temas sensoriais são sugeridos, com recurso a uma análise de correspondências múltiplas. A operacionalização dos temas em quatro segmentos de turistas com perfis distintos, com base nas atividades realizadas no destino e nas motivações dos participantes para a escolha do destino de férias foi conduzida através de uma análise *cluster*. Os quatro temas identificados referem-se a experiências especificamente rurais, a experiências do destino com especial foco nas atividades relacionadas com a praia, a experiências de natureza e a experiências de natureza espiritual.

2.6. A experiência sensorial turística rural e a segmentação de turistas

A segmentação do mercado turístico consiste na identificação de grupos homogéneos de turistas que partilham necessidades e desejos similares e aos quais se adequam determinadas ofertas e ações de marketing operacional (Middleton e Hawkins, 1998). Este processo tem resultado em

benefícios que têm sido discutidos no âmbito da literatura do turismo em geral e do turismo rural em particular (Kastenholz *et al.*, 1999; Park e Yoon, 2009). Considerando a diversidade de turistas que procuram destinos rurais, nichos de mercado podem ser identificados visando a materialização de uma vantagem competitiva e uma alocação eficiente dos recursos (Kastenholz *et al.*, 1999; Lane, 2009). De facto, a gestão da procura torna-se crucial, tendo em conta que a sensibilidade dos turistas relativamente ao carácter rural dos destinos que procuram para as suas férias varia, assim como o decorrente impacto local (Kastenholz, 2004; Lane, 1994).

Alguns autores alertam para o facto de a segmentação de mercado realizada a partir de variáveis sociodemográficas ser insuficiente para fins de marketing (Plog, 1994), tendo vindo a ser exploradas outras variáveis no âmbito da segmentação de turistas rurais, tais como: os benefícios procurados, as motivações e as atividades realizadas no destino (Kastenholz *et al.*, 1999; Park e Yoon, 2009). De acordo com a literatura, para além do facto de as sensações serem responsáveis por desencadear o processo da perceção (Goldstein, 2010), a perceção da experiência sensorial é apropriada para a identificação de diferentes perfis de turistas, uma vez que a perceção incorpora implicitamente interesses pessoais, como é o caso das atividades realizadas no destino, assim como outras características psicográficas (Agapito *et al.*, 2014).

2.7. O planeamento e a comunicação da experiência sensorial turística rural

De forma a garantir benefícios a todos os *stakeholders* envolvidos no âmbito do turismo rural, os diferentes perfis de turistas a que as estratégias de marketing se dirigem devem corresponder ao uso sustentável dos recursos existentes no destino, sendo expectável que este processo contribua para um aumento dos níveis de satisfação tanto para visitantes como para as comunidades locais, mitigando o *gap* entre as expectativas e as experiências vividas (Dolnicar, 2004; Kastenholz, 2004; Manente e Minghetti, 2006). De facto, a qualidade dos recursos locais constitui o primeiro atrator para os destinos rurais, correspondendo normalmente um aumento da procura a uma maior pressão na preservação dos recursos do destino (Clark, 1999). Assim, contrariamente à tendência para avaliar os recursos de uma forma individual, uma abordagem holística à experiência global turística nas áreas rurais reforça a importância de se gerar sinergias com os diferentes ativos existentes (Cawley e Gillmor, 2008). Desta forma, como parte integrante do carácter dos destinos rurais, as

comunidades devem ser envolvidas no processo de criação de uma oferta de turismo rural de qualidade (Kastenholz *et al.*, 2012a, 2012b), o que encoraja o turista a realizar as suas férias em áreas rurais (Lane, 2009). Os recursos multissensoriais, como a fauna, a flora, a gastronomia e o património cultural material e imaterial, podem assim ser usados de forma integrada para concetualizar experiências sensoriais turísticas que permitam ao turista experienciar atmosferas locais percebidas como autênticas, sendo geradoras de vantagens competitivas nos destinos rurais (Haven-Tang e Jones, 2010). Torna-se ainda importante notar que tendo em conta que a recreação ao ar livre em áreas naturais tem implicações estéticas que afetam a qualidade da experiência do visitante (Pilcher *et al.*, 2009), a atenção do marketing em perfis específicos de turistas contribui para facilitar a gestão das atividades realizadas ao ar livre, de uma forma sustentável (Agapito, 2013).

Verificando-se que as organizações mais pequenas de marketing e gestão dos destinos beneficiam de orçamentos insuficientes para desenvolver estratégias de marketing com impacto significativo, a colaboração dos setores privado e público é crucial no planeamento da experiência turística rural. A concetualização de ofertas dirigidas a segmentos de turistas específicos e, em particular, a exploração de nichos de mercado, devem ser realizadas em rede e com sinergias desenvolvidas com regiões vizinhas associadas a experiências sensoriais semelhantes ou complementares (Morgan, 2010; Pan e Ryan, 2009; Roberts e Hall, 2004; Stamboulis e Skayannis, 2003). As estratégias de marketing colaborativas podem ainda resultar em eventos e roteiros sensoriais dirigidos a turistas e visitantes com diferentes motivações e necessidades (ex. turistas invisuais, jornalistas especializados em turismo) ou iniciativas que explorem a gastronomia local, promovendo experiências turísticas sensoriais interativas, envolvendo a comunidade local (Agapito *et al.*, 2014; Daugstad, 2008; Pan e Ryan, 2009). É neste contexto que se torna pertinente o envolvimento das indústrias criativas (ex. filmes, arquitetura e música) de forma a criar condições geradoras de experiências únicas (Mossberg, 2007) nos destinos rurais.

Considerando que a experiência turística não se esgota na visita ao destino, mas inicia-se antes da visita e continua após o turista regressar a casa, as tecnologias de informação e comunicação devem ser otimizadas durante as diferentes fases da experiência, através do recurso a informação sensorial (Gretzel e Fesenmaier, 2003, 2010; Neuhofer *et al.*, 2012; Stamboulis e Skayannis, 2003). Na fase de antecipação, os sites dos destinos rurais podem explorar todos os sentidos de forma a

apresentar a sua oferta experiencial de uma forma rica e interativa, através do recurso a *advergames*, a vídeos e a mapas sensoriais, que auxiliem na decisão de escolha do destino e no planeamento da viagem. A experiência *in loco* pode ser intensificada através de roteiros multissensoriais, da criação de aplicações para telemóveis, usando tecnologias como o GPS ou os sistemas de informação geográficos, assim como o encorajamento da partilha em tempo real de experiências, através de passatempos e concursos (Agapito *et al.*, 2013). O pós-viagem é um estádio vital uma vez que muitos turistas continuam a beneficiar do prazer da sua escolha após o regresso a casa na forma de *dinner-table stories*, oferta de *souvenirs*, partilha de fotografias com a família e amigos, materializando memórias que perduram. Além disso, o pós-viagem também influencia o nível de satisfação, intenções de visitar o destino e a recomendação a amigos e familiares. De facto, o lugar visitado, bem como as atividades em que o turista participou durante a sua visita, apresentam um valor simbólico na apresentação do *self* a amigos, colegas e familiares (Crouch *et al.*, 2004: 4). Nesta fase, a partilha de histórias em *blogs* ou o uso de repositórios de disseminação de vídeos podem ser incentivados pelas organizações de marketing e gestão dos destinos (Gretzel *et al.*, 2011; Tussyadiah e Fesenmaier, 2009), assim como o desenvolvimento de iniciativas como a criação de mapas e roteiros sensoriais com o auxílio de testemunhos de turistas, como é o caso da conceção do mapa sensorial de S. Paulo, no Brasil (www.sensationsmap.com), que pode ser adaptado aos destinos rurais.

3. Conclusão

O marketing sensorial oferece um importante contributo para o marketing das experiências turísticas rurais, uma vez que os cinco sentidos externos – visão, audição, olfato, paladar e tato – são responsáveis por processar os estímulos sensoriais presentes no ambiente externo, físico ou virtual, desencadeando as diferentes sensações que iniciam o processo de percepção da experiência turística. Estudos turísticos recentes evidenciam o potencial do uso dos estímulos sensoriais no marketing de experiências turísticas em ambientes rurais e a necessidade da adequação do marketing sensorial às particularidades das áreas não urbanas (Agapito *et al.*, 2013; Dann e Jacobsen, 2003; Kastenholz *et al.*, 2012b; Pan e Ryan, 2009). Neste contexto, o presente trabalho visou uma reflexão sobre o papel dos sentidos no marketing de experiências turísticas positivas, únicas e memoráveis que potenciem o desenvolvimento sustentável dos destinos rurais.

A literatura apresentada nesta reflexão sugere a pertinência da análise de experiências sensoriais rurais reportadas pelos turistas, visando o *design* de ambientes adequados a uma experiência turística rural de qualidade. De facto, os estímulos sensoriais podem ser organizados sob a forma de temas passíveis de ser usados como base de experiências turísticas rurais positivas, únicas e memoráveis, numa oferta coerente do destino, podendo estes temas ser explorados pelos alojamentos e organizações turísticas, individualmente e em rede (Agapito *et al.*, 2014; Gretzel e Fesenmaier, 2003, 2010; Stamboulis e Skayannis, 2003). A nível prático, os temas multissensoriais podem estar relacionados com a gastronomia local, com elementos da natureza, ou com o próprio carácter rural dos alojamentos, podendo ser estruturadas atividades em torno da experimentação de diferentes texturas ao nível do solo, da arquitetura e dos produtos locais, por exemplo. Podem ainda ser equacionados centros de interpretação locais, roteiros e mapas interativos com base na experiência sensorial, dirigidos não apenas a turistas, mas também a visitantes e à comunidade em geral.

O estudo de experiências turísticas sensoriais permite ainda a segmentação de turistas, um processo que auxilia no uso dos recursos endógenos rurais de forma eficiente e na definição de estratégias de marketing dirigidas a segmentos de turistas com motivações e interesses específicos que potenciem o desenvolvimento sustentável local (Agapito *et al.*, 2014). O uso de informação sensorial contribui para otimizar a experiência turística e harmonizar os interesses e necessidades dos diferentes *stakeholders*, encorajando em particular a cocriação da experiência global rural entre turistas, organizações e comunidades local (Kastenholz, 2012a; Mossberg, 2007). Importa notar que o foco não apenas nos estímulos visuais, mas numa perspetiva integrada de todos os sentidos, explorando o potencial das novas tecnologias de comunicação, potencia ainda o desenvolvimento de um turismo mais responsável, tornando mais positiva a experiência turística de visitantes com limitações a nível sensorial, como é o caso dos turistas invisuais, ou a nível de acessibilidade (Abranja *et al.*, 2010; Richards *et al.*, 2010; Small *et al.*, 2012).

Em suma, este trabalho permitiu refletir sobre o marketing sensorial como uma ferramenta com o potencial de desencadear emoções positivas, potenciadoras de elevados níveis de satisfação e fidelização aos destinos, contribuindo para o *design* e comunicação de experiências turísticas rurais sustentáveis. Neste contexto, as indústrias criativas devem ser chamadas a explorar características sensoriais únicas dos destinos,

auxiliando as organizações de gestão e marketing das áreas rurais no *design* de uma oferta coerente ao nível da experiência sensorial rural global. Este processo permite contribuir ainda para a clarificação da identidade e imagem de marca dos destinos, com recurso às novas tecnologias de informação e comunicação durante as diferentes fases da experiência turística, atendendo aos objetivos de desenvolvimento sustentável dos destinos rurais.

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Notas

- De acordo com a legislação portuguesa, os empreendimentos de turismo no espaço rural podem ser classificados nas seguintes tipologias: casas de campo, agroturismo e hotéis rurais. As casas de campo são definidas como imóveis situados em aldeias e espaços rurais que se integrem, pela sua traça, na arquitetura típica local. No caso em que as casas de campo se localizem em aldeias e sejam exploradas de uma forma integrada por uma única entidade, são consideradas como turismo de aldeia (Dec.-Lei n.º39/2008).

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Rescue archaeology heritage valuation in Europe's largest dam – Alqueva: *ex-situ* products as elements of creative tourism

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Abstract: The study aims to determine how the knowledge obtained from the study of prehistoric heritage found during the construction of the Alqueva dam and irrigation system (Portugal) can enhance the current tourist experience of the destination. A new approach is necessary given the inaccessibility of the archaeological remains, thus creative tourism and experience economy frame the theoretical basis of this paper. Semi-directed interviews were carried out to 35 tourism stakeholders in order to assess their view of the regional tourism experience, their interest in *ex-situ* and virtual products based on the archaeological knowledge and how these may add to the Alqueva destination. Findings show that stakeholders are still firmly attached to the conventional approach to archaeology but that, even though unaware of the archaeological findings, they believe that they could benefit from the introduction of creative products as a way of complementing the current offer.

Key Words: Alqueva dam, rescue archaeology, creative tourism, experience economy, archaeological tourism, intangible heritage.

Valorização de arqueologia de salvamento na maior barragem da Europa - Alqueva: Produtos *ex-situ* enquanto elementos de turismo criativo

Resumo: O estudo tem como objetivo verificar o modo como o conhecimento obtido a partir do estudo do património pré-histórico encontrado durante a construção da barragem e sistema de irrigação do Alqueva (Portugal) pode contribuir para a experiência turística do destino. Dada a inacessibilidade do património é necessária uma nova abordagem, pelo que o enquadramento teórico deste trabalho foca o turismo criativo e a economia da experiência. Foram realizadas entrevistas semi-dirigidas a 35 entidades ligadas ao turismo, a fim de avaliar a sua visão da experiência turística regional, o seu interesse em produtos *ex-situ* e virtuais baseados no conhecimento arqueológico e como estes podem valorizar o destino Alqueva. Os resultados mostram que os stakeholders estão muito ligados a uma abordagem convencional relativamente à questão arqueológica mas que, porém, acreditam nos benefícios que poderão advir da introdução de produtos criativos, por forma a complementar a oferta atual.

Palavras-chave: Barragem do Alqueva, arqueologia, turismo criativo, economia da experiência, turismo arqueológico, património imaterial.

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1. Introduction

The knowledge produced by archaeological research provides a window into the past of a people, helping to understand and to strengthen their historical and cultural identity. The way that such knowledge is conveyed, namely by means of tourism, in this case cultural and creative tourism, is the theme of this paper.

The practice of archaeology has been changing during recent decades, turning more and more to the rescue intervention related to development expansion and the prevention and mitigation of impacts of large construction projects. Since the drafting of the Environmental Impact Assessment (EIA) European Directive in 1985 and the 1987 Environmental Law, in Portugal, it is required that the project for the construction of large building works include in the EIA the evaluation and recording of the archaeological heritage to be affected by the construction before it is destroyed (Ferreiro, Gonçalves, and Costa, 2013).

This practice is also called commercial or contract archaeology, for it prompted the rise of businesses specializing in archaeology whose work currently represents about 90% of the archaeological research conducted in Portugal (Bugalhão, 2011).

Similarly, the tourism industry has also undergone tremendous changes over the last decades. Apart from basic services, tourism currently aims to provide a unique experience (Richards and Wilson, 2006; Stamboulis and Skayannis, 2003; Waitt, 2000), as is the case of cultural tourism, for instance, where the tourist seeks above all to “discover, learn and explore the attractiveness of a region” (Turismo de Portugal, 2006: 9). In this way, cultural tourism has become a form of commodification of culture, in that it manages to transform cultural heritage into consumable experiences (Pereiro, 2009). The same applies to creative tourism. Stemming from cultural tourism, creative tourism seeks to stimulate the creative streak of the consumer by structuring the destination and the products in a way that encourages tourist participation in activities that fuel their creative expression. This process allows to achieve an almost uniqueness of the tourist experience that is difficult, if not impossible, to replicate (Richards, 2011a).

This study is part of the ongoing project *Funerary practices in Alentejo's Recent Prehistory and socio-economic proceeds of heritage rescue projects* (Ref. PTDC/HIS-ARQ/114077/2009), which focuses on the study of prehistoric funerary practices in the low Alentejo region and the creation of knowledge diffusion models produced over non-accessible (or totally dismantled) archaeological heritage, while simultaneously attempting to merge the archaeo-

logical problem and its accessibility by the general public. The purpose of the present study is to test the relevance and value of non-accessible archaeological heritage for the development of *ex-situ* and virtual tourism products and services that enable a certain region (Alqueva, Portugal) to become a destination of archaeological interest. We aim to understand specifically how the stakeholders of the regional tourism sector perceive and value the archaeological knowledge obtained in the Alqueva region, particularly from two Neolithic necropolises, and what their expectations are in what concerns the potential use of this knowledge from a creative tourism perspective. Moreover, we analyse how stakeholders view these creative products with regard to the overall tourism experience of the Alqueva destination.

To meet these goals, and in order to get a deeper understanding of the stakeholders' view (Albarello *et al.*, 1997), we used a qualitative method based on semi-directed interviews held with representatives of public authorities and tourism promoters of the study area.

The paper first presents a brief summary of the literature that contextualizes the study in its theoretical framework of the concepts, namely creative tourism and experience economy. Secondly, the Alqueva dam and the archaeological findings are presented, followed by a description of the applied methodology. We then present and discuss the results, followed by the conclusion.

2. Rescue archaeology and creative tourism

One of the primary peculiarities of rescue archaeology is the fact that in most cases only the knowledge of the past obtained from archaeological research is kept, according to the so-called “principle of conservation by scientific record.” Prior to the execution of a construction project, the archaeological remains unearthed at the construction site are studied and documented and afterwards, except for a few specific cases, they are destroyed in order to give rise to the proposed building work. As a result, only the archaeological knowledge of the studied site remains for future reference (Silva, 2005). The valuation of this knowledge through its use for tourism purposes is not possible by conventional means (*i.e.* visit to archaeological sites); hence a different approach is necessary. Creative tourism has the potential to provide an innovative approach to intangible assets that result from rescue archaeology intervention.

The huge growth in cultural tourism in recent years has led to the search for new ways of designing tourism products (Richards, 2011b). Thus, there has been a growing interest in creative tourism with the

intention of differentiating products in the overcrowded marketplace (Richards and Wilson, 2006; Stamboulis and Skayannis, 2003). UNESCO defines this type of tourism as “travel directed toward an engaged and authentic experience, with participative learning in the arts, heritage, or special character of a place, and it provides a connection with those who reside in this place and create this living culture” (UNESCO, 2006: 3). Rather than providing a product for passive consumption, creative tourism encourages the active involvement of the tourists with local people in local activities, thus enabling them to develop their creative skills. Creative tourism, therefore, seeks to differentiate itself from mainstream tourism by offering greater freedom for the consumers to create their own product which, by reflecting their own interests, makes the overall experience more personal, authentic and impossible to be duplicated by someone else (Richards, 2011a).

Creative tourism products frequently provide the opportunity to participate in day-to-day activities, e.g., the production of local crafts, cooking workshops for local cuisine or other typical activities that represent the region’s uniqueness (Richards and Wilson, 2006; Tan, Kung and Luh, 2013). What distinguishes creative tourism is the fact that tourists can interact, develop and express their creative sides and participate in creating their own product. One of the reasons for the success of this kind of product is the fact that all of us are creative to some degree, each person in his/her own way (Tan *et al.*, 2013).

3. Experience economy

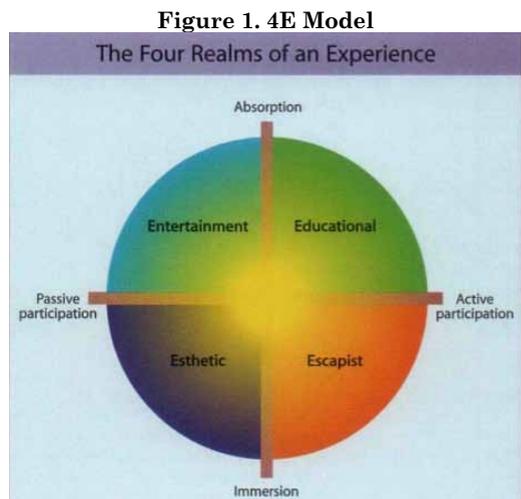
The development of creative tourism from cultural tourism can be traced back to the experience economy (Richards, 2011a). According to Pine and Gilmore (1998), after a first economic stage essentially based on transactions of primary goods, followed by a phase of industrial production and another dedicated to the production of services, the experience economy emerged as the fourth stage in economic development. In the latter, the aim is to stimulate the senses and emotional and rational aspects of the consumer in order to ensure a memorable experience of unique contours (Oh, Fiore and Jeoung, 2007; Pine and Gilmore, 1998).

Creative tourism has like no other tourism form embedded this experiential perspective. Whereas tourism activity was previously limited to providing the opportunity to visit and enjoy other places and cultures, today we witness a great demand for “authentic experiences” and products which, more than allowing the visit, encourage as much as possible the participation and involvement of the tourist in the

destinations activities in an attempt to devise an experience of total cultural immersion (Hayes and MacLeod, 2007; Richards, 2011b; Stamboulis and Skayannis, 2003).

This experience is far more dependent on the irrational and emotional side of the consumer, since it goes against the conventional business logic that takes the consumer as a rational thinker (Schmitt, 1999; Gentile, Spiller and Noci, 2007). The important thing here is to capitalize on and profit from the emotive aspects that a product stirs in the consumer. Gentile *et al.* (2007) go further and state that it is not only about selling an experience, but rather a way of understanding the consumers as individuals and trying to create a holistic relationship between them and the brand, offering items and contexts so that they may craft the experience on their own (even if unconsciously) thus developing an emotional relationship with the firm.

To clarify this level of consumer involvement, Pine and Gilmore (1998) suggested a conceptual framework that structures the experience into four realms. Therefore, depending on its degree of participation, immersion and absorption, the consumer experience can be classified in the realms of Entertainment, Education, Esthetic and Escapism (4E Model) (Figure 1). An experience may combine the dimensions and simultaneously stand in one or more realms. Indeed, according to Pine and Gilmore (1998) and Gentile *et al.* (2007), an *optimal experience* will be that which evenly combines all realms. However, this concept is debatable, as the value of the experience depends mainly on each person’s expectations and desires and the transformation that it can effect in the individual (Morgan, Elbe and Curiel, 2009).



Source: Pine and Gilmore, 1998.

Nevertheless, despite the utility of Pine and Gilmore's (1998) 4E Model to conceptualize the experience as a marketable product, be it touristic or not, there are few empirical instruments that allow for an effective evaluation and operationalization of the experience (Morgan *et al.*, 2009; Oh *et al.*, 2007). Hence, some authors have carried out exploratory studies and sought to build scales that make it possible to assess the tourism experience based on this conceptual model.

Oh *et al.* (2007) applied a Likert response survey to guests and owners of Bed & Breakfast units in order to measure their perception of the experience in light of each of the four realms and understand which ones were most valued in the consumption/planning of the accommodation experience. The study also sought to create theoretical variables to assist promoters in interpreting the experience of tourists so as to better plan their products.

In addition to the planning of products, likewise a destination should be arranged strategically and can gain if there is an understanding of the current trends in the tourism industry. Thus, some authors, such as Morgan *et al.* (2009), analysed the perception of tourism promoters from three localities concerning the transition from a service economy to an experience economy, as well as the implication that this concept has in destination management and the strategic planning of their products. For this purpose, the authors led interviews in order to identify what kind of experience the promoters aimed to provide to their customers, whether this process was done consciously or unconsciously, and their opinion about this new management approach. In these interviews, in addition to questions, cards with sentences were handed out that gave the promoters the opportunity to reflect and comment directly on the ideas present in the literature on the subject, particularly if they thought the current economy was, in fact, directed toward the transaction of experiences.

In sum, the 4E model has been a helpful tool for strategic planning of touristic products and destination management.

4. The Alqueva dam and archaeological findings

The Alentejo is a region with low rainfall and low population density. The history of the Multi-Purpose Alqueva Dam (EFMA) dates back to

Figure 2. Map of Alqueva Great Lake and Location of sample municipalities



Source: adapted from EDIA, n.d.b.

1957, the year the Alentejo Irrigation Plan was developed with the aim of improving conditions for agricultural development in the region. After several decades of advances and setbacks, concreting the dam began in 1998 and was completed in 2002, giving birth to the largest artificial lake in Europe. However, the EFMA, which also includes the primary and secondary irrigation system in addition to the lake, directly affects a much larger area that spans about 10,000 km² (EDIA, n.d.a). The Alqueva dam is located between the municipalities of Vidigueira, Moura and Portel and the Great Lake stretches towards north, covering an area of 250 km² (Figure 2).

During these years several environmental impact studies and many archaeological interventions were conducted, intensified from 1995 onwards by the outbreak of the Foz Côa dam case (Silva, 2002). The huge expanse of land affected by the EFMA and the resulting archaeological interventions in the region - one of the most intensely excavated territories in Portugal - revealed empirical data that allow to know with particular detail the communities that lived in this territory for centuries and trace the history of the region over the last 8000 years (Fabião, 2002; Oliveira, 2002).

Some of the most significant findings in the area are Neolithic necropolises. For this study, two funerary complexes of particular relevance are used as references: the necropolis of hypogea Outeiro Alto 2 (located in Serpa municipality) and the funerary complex of Sobreira de Cima (Vidigueira municipality). Both reflect in exemplary manner the possible outcome of rescue archaeology intervention: the first because it has been closed off on an artificial island in the middle of an irrigation tank, preventing easy access to the site; the second

because it was found during the construction of an electrical substation, so consequently the safety measures due to high-voltage are incompatible with the presence of visitors or tourists.

5. Methodology

In order to meet the goals proposed in this study, data collection was conducted through semi-structured interviews with local and regional stakeholders connected to the tourism industry.

5.1. Sample selection

The geographical area covered by this project is the Alentejo, specifically the region south of the Alqueva dam, and includes the following municipalities: Beja, Serpa, Ferreira do Alentejo, Alvitto, Cuba, Vidigueira, Moura, Barrancos, Aljustrel, Castro Verde, Mértola (in Portugal); and part of the province of Huelva, in particular Rosal de la Frontera and Aroche (in Spain). Due to the large extent of the area covered, we restricted this study to a sample of three municipalities, namely Serpa, Moura and Vidigueira, the area where the two main archaeological sites of this project were found (Serpa and Vidigueira). Moreover, the municipality of Moura was also included in the sample because, despite the fact that the Sobreira de Cima necropolis is located within the boundaries of Vidigueira municipality, it is geographically closer to the city of Moura.

Stakeholder selection was based on the Andalusian tourism cluster map (Lastra-Anadón *et al.*, 2011) assuming a similar framework for a possible tourism cluster in this area of Portugal and Spain. Stakeholders of the sample were categorized according to the scope of action taking into account the classification suggested by Grimble and Wellard (1997) namely: regional, local on-site and local off-site.

The regional stakeholders included the institutional organizations responsible for the management, coordination and tourism promotion in the Alentejo, as well as archaeological experts of the region.

The main inclusion criterion on the local scale was the geographical distance to the archaeological sites of reference. Thus in Serpa priority was given to stakeholders in the parish of Brinches; or Pias if there were none, since the Outeiro Alto 2 site is located between the two villages. In Vidigueira priority was given to stakeholders in the village of Marmelar, near Sobreira de Cima; or Pedrógão do Alentejo, the seat of the parish, if there were none. In Moura priority was given to stakeholders

of the city, as it is the urban center closest to the Sobreira de Cima graves. The local on-site scope refers to the villages of Brinches and Marmelar and the off-site refers to interviewees from Pias, Pedrógão, Serpa, Vidigueira and Moura. Interviews were held with representatives of governing bodies (town halls and parish councils), museums and cultural associations, producers of local products and handicraft and owners of private sector companies: tour operators, hotels and restaurants.

A total of 35 interviews were carried out from February through May 2013.

5.2. Analytical tools

The interview was structured in two parts. The first part consisted of a set of questions grouped under the following goals: (i) to examine the Alqueva tourism destination in light of the experience economy; (ii) to understand the stakeholders' perception of the archaeological works undertaken in Alqueva and the touristic value of the knowledge obtained; (iii) to understand their views on the operation and benefits of archaeological knowledge of Alqueva and associated products for the regional tourism market.

In the second part of the interview we handed out four cards with selected sentences to understand how the stakeholders perceive the four realms of experience and place the archaeological tourism products within Pine and Gilmore's (1998) 4E model. Unlike Oh *et al.* (2007), the interview script used by Morgan *et al.* (2009) does not address directly Pine and Gilmore's (1998) 4E model. Therefore, and given that the size of our stakeholder sample was not adequate for the use of surveys, we took some of the questions raised in Oh *et al.*'s (2007) survey and adapted them to the form of cards used by Morgan *et al.* (2009). A single sentence that best represents the nature of each realm was drawn from Oh *et al.*'s (2007) questionnaire for each card, and in some cases two items were combined in the same card for clarification purposes. The following sentences were used:

- 1) Archaeological tourism should provide the chance for tourists to learn something new and increase their knowledge. (*Educational realm*)
- 2) Archaeological tourism should be attractive and stimulate the senses of the tourist. (*Aesthetic realm*)
- 3) Archaeological tourism should allow the visitor to relax whilst watching recreational activities and events for his/her entertainment. (*Entertainment realm*)
- 4) Archaeological tourism should allow visitors to forget about their daily routine and encourage their participation in different activities. (*Escapist realm*)

5.3. Data processing and content analysis

The interview script was tested on the first five interviews and then subject to minor adjustments. All interviews were recorded on audio, each lasting on average 45 minutes (total of 26 hours and 50 minutes), and were later transcribed by the researchers. Content analysis of the interviews was performed with the assistance of MAXQDA 11 computer software, and the resulting categories obtained by axial coding (Saldaña, 2009). These categories are:

Group 1. Perception of tourism in Alqueva: The first category reflects the stakeholders' perception of the Alqueva tourism market, the most relevant tourism products and resources, description of the destination before and after construction of the dam including product diversification, and the potential of the Great Lake for tourism. It also includes thoughts on a few other issues, such as expectations about the future of the destination and problems that affect tourism development.

Group 2. Perception of rescue archaeology intervention: This includes the stakeholders' knowledge about the archaeological works that took place during the construction of the Alqueva dam and irrigation system as well as their opinion on the value of the archaeological heritage for local communities and for tourism. Some examples of current tourism projects that benefit from archaeology are also referred.

Group 3. Operationalization of archaeological knowledge: This category covers the opinions of stakeholders on the possibility of developing tourism products based on the archaeological knowledge, plus their comments on how these products can be combined with their current business. It also relates to issues concerning the promotion and marketing of these products and the need to assess the market before product development can take place.

Group 4. Experience realms of archaeological tourism: The final group comprises the results on the relevance of each realm of experience defined by Pine and Gilmore (1998) for archaeological tourism. Stakeholders received four cards, each with a different sentence describing one realm, and ranked the cards according to what they believed was more important in an archaeological tourism experience. Their comments about the realms were also collected.

6. Results

Group 1. Perception of tourism in Alqueva

- Tourism in Alqueva

Four participants (n=4) stated that prior to the dam there was no significant tourism activity in the Alqueva region and that it was similar to the rest of the inner Alentejo. Currently, the region's most popular tourism products and resources are

food and wine (and related products: food festivals, wine routes, etc.) (n=12), its architectural/historical heritage and museums (cultural tourism) (n=9), with handicrafts (n=4), house-boats and nautical recreation (n=3), landscape (n=2), the rural setting (n=2) also mentioned. Less significant are, according to the stakeholders interviewed, hunting tourism (n=1), birdwatching (n=1), nature and active tourism (n=1), despite the region's potential.

Five respondents mentioned that the dam has the potential to become a structural element for tourism in the Alentejo, although others (n=3) are doubtful about its tourism potential, justifying their opinion with similar tourism projects related to dams in the past that have failed. An entrepreneur said the Great Lake has created the conditions for it to become a "tourism destination" in the definition of WTO, although the regional tourism authorities are more cautious, acknowledging that the region has gained visibility and an important resource but which is still not significant in terms of market.

- Impact of the dam

Regarding the impact of the dam on tourism, some stakeholders (n=8) stated that there was an increase in demand after the construction of the dam. Ten others said there was a great movement of people visiting to see the dam finally built, although these contribute little to the tourism sector (n=4). However, most interviewees (n=12) stated that, apart from this sightseeing activity, there was no increase in tourists visiting the region after the inauguration of the dam in 2002. Similarly, although there is a new feature – the Great Lake – few new tourism products have been developed which are associated with it (n=5). An exception is the example, several times mentioned (n=7), of the Amieira Marina, a local tour operator that rents boat-houses to tourists who wish to cruise the lake, a product which has become pivotal in the region. There is also the Dark Sky Alqueva, an astro-tourism project, although it is still in an early stage and therefore its acceptance as a full "tourism product" is arguable, as two respondents stated.

This lack of demand is attributed by stakeholders to several limitations, such as the absence of infrastructure (n=10) (low accommodation capacity or lack of piers to support nautical and beach leisure activities), desertification (n=6) and aged population (n=3), poor quality of the water (n=3), a fragile business environment (n=2) and the current economic crisis (n=2).

A tourism entrepreneur summed up the sense of dashed expectations regarding the impact of the dam: "There was so much talk about Alqueva, as a great national hope, not only for the irrigation, but in what concerns tourism it came to nothing. All people spoke of were projections".

Group 2. Perception of rescue archaeology intervention

- Archaeological works

Apart from the experts, who follow the archaeological research done in Alqueva and its results, and are aware of its scientific and empirical relevance, there is general lack of knowledge on the part of the local and regional tourism promoters (n=15) in regard to the archaeological intervention held during the EIA of the Alqueva dam. There is a widespread notion that the building works involved teams of archaeologists, but very few stakeholders actually know what was found. Only five of the respondents, namely public authorities, said to have followed the excavations but still do not know their scientific relevance.

However ignorant, still stakeholders argued that archaeology is an important part of regional tourism, as there are plenty of archaeological sites in the region, mostly megalithic monuments (a reference in tourism), and many (n=10) showed great interest to know the results, unable to understand the reason why this information has not been disclosed to the tourism stakeholders and local communities beyond academia.

- Touristic value of archaeology

With regard to the touristic value of archaeology four experts revealed that the archaeological heritage in general is not a feature that attracts many tourists compared to other resources. Moreover, two experts and those who are aware of the findings in Alqueva recognized that, despite their great scientific value, most of the pieces found are not sufficiently attractive for the conventional tourist market.

On the other hand, despite the widespread ignorance about the results, many stakeholders (n=19), both private and public, believe that the archaeological knowledge of the region can be a feature of great value to the tourist market, e.g., as a differentiating factor of the destination (n=1). Nonetheless, some respondents (n=6) noted that it is a resource and not a product, a resource which they believe is currently under exploited and which may become an important element for tourism development in the region, although this will depend on the sensitivity towards archaeology of the people in decision-making positions (n=3), the investment made (n=2) and the use of this knowledge according to the tourism demand rather than scientific interest, i.e., archaeological tourism products should not be “too scientific” (n=3). Five respondents stated that the archaeological knowledge may come to leverage future developments, namely in cultural tourism.

However, nearly half of the stakeholders (n=15) argued that archaeological knowledge should not

be used for the development of tourism products *per se*, rather it should be used to supplement other products existent in the region. As a matter of fact, tourists who come looking for archaeology also have other interests (n=4), so it is a matter of interweaving the knowledge into these products and services. The stakeholders’ interest in the valuation of archaeological knowledge is based on their concern in enhancing their own business or activity. Thus, archaeology is seen as a way to supplement what already exists, creating new business opportunities and expanding current activity. Some relevant examples of archaeological heritage in the complementary context were mentioned, such as the Archaeological Complex of Perdigões (which is used as a complement to wine tourism), the Dark Sky Alqueva (which uses some megalithic monuments for star gazing sessions), or the S. Cucufate ruins in Vidigueira.

- Value of archaeology for local people

Nearly one third of the stakeholders (n=9) said that there is a general “feeling” that archaeology is an important part of the regional cultural heritage and identity. However, some warned of conflicts that frequently take place and the need for awareness and dissemination of archaeological practice and results. The most common case is that of farmers which come across archaeological remains on their land, destroying them without notifying the authorities so as to not lose the piece of land for cultivation. Some resentment towards archaeologists was identified, based on the lack of knowledge and understanding about archaeology’s value and working methods, and these conflicts may hinder tourism development based on the archaeological heritage.

Group 3. Operationalization of archaeological knowledge

- *Ex-situ* archaeological tourism

With regard to the use of archaeological knowledge for the development of creative tourism products, some stakeholders (n=4) seemed confused by the fact that the archaeological remains found were made inaccessible. Nevertheless, the need to develop innovative products with a strong emphasis on creativity was referred (n=2), as was done for example in the Dark Sky Alqueva project.

Several suggestions were made concerning the kind of product that could use this archaeological knowledge in theme development. These were: musealization and exhibitions (n=14), ICT and digital restitution of the findings (n=8), creation of related labels for regional products (e.g., olive oil, wine, cheese) (n=8), arts and handcrafts inspired

by the findings (n=5), touristic routes that convey the new archaeological knowledge at other sites which remain visitable (n=5), themed events (i.e., Neolithic/Archaeological festival) (n=5), nautical themed activities (i.e., archaeological regatta) (n=2), projects for children (i.e., archaeological games) (n=2), theatre plays (n=1) and a theme park (n=1).

- Promotion of archaeological tourism

Several suggestions were made for promoting this kind of product, namely through the internet and social networks, which are free, newspapers and local radio stations, or through flyers and posters, or word-of-mouth.

The organization responsible for the tourism promotion of the Alentejo argued that marketing of the Alentejo destination should be taken as a whole, and that it cannot be done for the Alqueva alone because the larger the destination, the more visibility it has. This promotion should be done in an integrated way, that is, cross-marketing distinct businesses and products. According to this organization, isolated marketing has no impact, rather it must be massive in order to effectively reach the consumer. This interviewee supported the use of opinion-makers as an inexpensive way to advertise, with great impact, although journalists do not typically write about the archaeological heritage, and that opinion-makers for this kind of heritage should therefore be academics.

Two stakeholders indicated the need to assess and be aware of current market trends in order to understand what kind of product may have the highest value. The tourism authorities did point out that tourism is a business which requires the commodification of a resource in order for it to become a tourism product. In the process of product structuring - an activity that is the “most alluring but at the same time extremely frustrating” (regional tourism business association) – it is critical to keep in mind that the quality, success and sustainability of the tourism product depends on its consumption and demand by tourists.

These tourist expectations were commented in several interviews. Some (n=6) reported that it is essential to provide good content to tourists, who have made an investment in their holidays, in order to meet their expectations, because their satisfaction will determine the quality of their experience and their potential return in the future. A tour operator maintains that it is his duty to tell a good story to tourists and offer them something that allows them to understand the territory in an amusing way, even if this means he has to romanticize or “put a frill here or there that didn't even happen exactly like that but that strikes the tourist” (local tour operator).

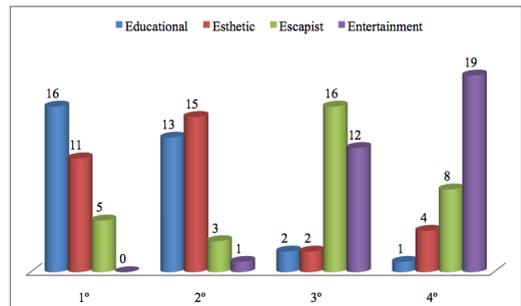
Group 4. Realms of the experience in archaeological tourism (4E)

This question was made to ascertain the respondents' point of view about the kind of experience that an archaeological tourism product should provide. Of the 35 stakeholders interviewed, three did not answer this question. In Table 1 we can see the number of times each realm was graded in position 1, 2, 3 or 4 in the order of significance (where 1=most relevant and 4=least relevant).

The results show a clear gap between the first two realms (Educational and Esthetic) and the latter two (Escapist and Entertainment).

The Educational and Esthetic realms were the most chosen in the first place by the stakeholders. Those who chose the Educational realm first (n=16) stated that archaeological tourism products should primarily provide a chance to acquire new knowledge, regardless of the depth, and that the search for new knowledge is part of the expectations of those who are interested in these kinds of products.

Figure 1. Ranking of the realms of experience



Source: by the stakeholders

On the other hand, those who chose the Esthetic realm first (n=11) argued that stimulation of the senses has to be part of the product – any tourism product – be it in the way it is structured and marketed or e.g. in the adrenalin it can create, because only then will it be able to stand out from the remaining offer and attract tourists regardless of their expectations or, for instance, their age.

The Escapist and Entertainment realms were more often placed in the 3rd and 4th places.

Those who mentioned the Escapist realm in first (n=5) argued that archaeological tourism should give people a different experience from their normal daily routine, and that “if the tourist is looking to feel the destination we should not give them too much information” (tourism entrepreneur). Others commented that archaeology is a door to

the past that has potential to provide an immersive experience that transports tourists into another era, allowing them to escape from their own. Two stakeholders rejected the idea of tourism as a way to escape the daily routine, arguing that the knowledge obtained in these activities should be useful in their day-to-day life.

No interviewee chose the Entertainment realm first. Those who commented on this realm mentioned archaeology's potential for performances and shows, i.e. theatre plays, although it is clear from the results that this kind of event done only as entertainment is less important, in the view of local stakeholders, and more difficult to link to archaeological heritage.

7. Discussion

The results from the interviews show that, contrary to expectations (Marujo, 2005; Turismo de Portugal, 2007), the Alqueva dam has not brought major changes to the regional tourism industry. While it is clear that the dam has altered the landscape, and that the dam and the Great Lake have become indisputable elements of interest to anyone visiting the region, however, according to stakeholders, it is far from being a destination ready for tourist consumption (Brandia Central, 2009). The increase in the number of people who visit the region is understandable given the extensive media coverage involving the dam project and construction, but, as stakeholders argue, these excursionists do not effectively contribute to short term tourism development.

Low tourism demand is directly related to the lack of supply of products and services. The emergence of the Amieira Marina is very relevant, and their supply of houseboats has become an important product for the region. However, considering the potential of the Great Lake and the expectations surrounding the dam, it falls short. Nonetheless, the success of this project indicates that it is possible to bring vigour to the region's economic fabric with small business projects more adequate to the local needs and reality, while simultaneously addressing a tourist needs.

The knowledge obtained from rescue archaeology intervention is, alongside the Great Lake, one of the main resources that the Alqueva dam project made available in the region. However, the results indicate that this knowledge, scientifically relevant as it may be, is not acknowledged as a valuable resource for tourism development because stakeholders are unaware of its existence and potential. To make it available for tourism purposes, a dissemination platform is required that can go beyond academic

circles and inform local communities and tourism stakeholders, thus allowing them to acknowledge its potential and find the best way to convey this knowledge to tourists through the provision of products and services. Moreover, this platform should involve both the archaeological experts and the promoters of construction works responsible for environmental impact studies in order to stimulate communication and knowledge transfer between all the players allowing collaborative and well-targeted action.

One should note, however, that the archaeological knowledge in itself is not a tourism product. It is a resource, and as such requires some breaking down before it can be developed as business (Pereiro, 2009). The use of this knowledge for tourism purposes should take into account, among other aspects, the particular needs of the industry and the expectations of tourists looking to visit the region. In this case, it is up to the tourism stakeholders to convert this scientific knowledge into something that can be assimilated and interpreted by someone who is not an expert in archaeology – the tourist, who is on leisure and holiday – keeping in mind that the value of the tourism experience depends not only on the scientific accuracy of the facts but, most importantly, in the emotions that this experience stirs in the tourist (Holtorf, 2007; Richards, 2011a; Waitt, 2000). Furthermore a great deal of creativity and innovation in the planning, product engineering and marketing is necessary in order to differentiate these products from conventional archaeological tourism, frequently associated with a small niche of archaeologists on their holidays (Holtorf, 2007). It may be useful to start a pilot project showing how a collaborative development can evolve and offer adequate results.

Archaeological tourism in the Alentejo is primarily associated with the Megalithic period and activities that have as a central element the megalithic monuments. In a creative tourism framework, we propose to go beyond these monuments, this tangibility, taking archaeology to other contexts and transmitting this knowledge through innovative and unusual formats. This will enable the creation of an entirely distinct tourism offer in the region which may also benefit from and support the existing megalithic tourism products and services.

According to the results of this study, the development of tourism products and experiences based on archaeological knowledge should provide an experience of personal transformation by means of learning and/or stimulation of the senses of tourists. This is supported by Pine and Gilmore (1998) for whom products that involve a greater degree of participation should focus on learning and transmitting knowledge. For example, in a replica of a Neolithic burial chamber, the opportunity for

tourists to engage in seemingly real archaeological excavations allows them to instruct themselves on the method and techniques of archaeological practice while simultaneously discovering the lifestyle and culture of Neolithic communities.

The more passive product can, *e.g.*, provide an opportunity for the vacationer to simply feel to the place. A cromlech visitor who appreciates immersing in the spirituality of the place can see this experience enriched with knowledge about the value or the social function of the monument to Neolithic populations. In another case, the experience of contemplating the night sky among menhirs can be enriched if you understand the worldview of the Neolithic communities and how their lives were governed by the stars. Moreover, replication by digital means, *e.g.* by installing a “digital cave”, enables a highly immersive experience.

However, the key issue is the product customization and personalization by the tourists, *i.e.*, the experience should be tailored as to correspond to their expectations. In this sense, tourists must feel that they can choose between an experience that transmits the knowledge in an academic way or in an imaginative way, for example. In the case of a Neolithic burial chamber replica that allows tourists to excavate and keep as souvenirs some artefacts placed there beforehand, the veracity and authenticity of the findings are not as important, rather the value of the experience is placed on the chance to dig immersed in the environment of an archaeological site. This makes it possible to use the acquired knowledge concerning the funerary practices to provide an immersive experience of archaeology without the need to actually present the real human remains unearthed during the salvage excavations.

Finally, it should be stressed that in creative tourism it is easier to create a supply of products and services than it is to ensure demand (Tan *et al.*, 2013), a fact also stressed by the tourism authorities of the Alentejo. The introduction of creative archaeological tourism products in the market must happen gradually, respecting regional dynamics and complementing existing products and resources with the new archaeological knowledge. In this sense, we believe the findings of this study may assist in the strategic management of the Alqueva tourism destination and product planning in light of the new trends of creative tourism and experience economy (Coccosis, 2009; Morgan *et al.*, 2009; Oh *et al.*, 2007).

8. Conclusion

It is generally agreed that never in the history of Portuguese archaeology have there been such

important empirical findings in terms of volume, geographical area studied and scientific knowledge generated as the venture carried out in the Alqueva region (Fabião, 2002).

This study shows that not much has changed in relation to the tourism experience in the region since the construction of the Alqueva dam and the filling of the reservoir. However, it is shown that the knowledge obtained from the rescue archaeology intervention can add to the current tourist experience. Since some of the existing tourism products already deal with archaeological sites, namely megalithic monuments, it is likely that the Alqueva's new archaeological knowledge will have to be progressively integrated into the market through selected products, bringing gradual change in the overall tourism experience and also convincing local entrepreneurs and institutional stakeholders of the potential of creative archaeological tourism in the region. Nevertheless, given the fact that the archaeological excavations are recent and most of the findings remain unpublished and unknown to the general public, including the local communities and tourism stakeholders, one cannot expect that the regional tourism industry will benefit from this heritage in the short term, as understandable also from the information collected in the here presented exploratory study.

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Criatividade Cultural – que oportunidade para destinos rurais?

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Resumo: Ao longo do século XX, a cultura tem vindo a assumir um papel distintivo na atividade turística, nas áreas rurais, em particular. As tradições, os costumes e a identidade local são recursos endógenos que têm integrado a experiência do rural, procurada por turistas cada vez mais exigentes. Neste artigo procurar-se-á compreender a experiência cultural vivida em Janeiro de Cima, uma aldeia do Interior Centro de Portugal, através das perceções de vários stakeholders do destino, e identificar potencialidades para desenvolver alternativas criativas que possam melhorar a experiência turística rural global. Os resultados demonstram que uma abordagem integrada do desenvolvimento turístico já está a ser implementada, mas ainda há potencial para explorar os recursos culturais existentes visando melhorar a experiência turística nesta aldeia, com todos os grupos entrevistados a reconhecerem o valor atrativo resultante da junção das tradições com a co-criação de experiências.

Palavras-chave: Turismo Rural; Criatividade Cultural; Aldeias do Xisto; Turismo de Experiências; Turismo Criativo.

Cultural creativity - that opportunity for rural destinations?

Abstract: During the 20th century, culture has progressively assumed a distinctive role in the tourism activity, particularly in rural areas. Traditions, habits and local identity are endogenous resources integrated in the rural experience, which is sought by ever more demanding tourists. This paper focuses on analysing the cultural experience offered in Janeiro de Cima, a village of Inland Central Portugal, through the perceptions of diverse destination stakeholders, identifying potential creative alternatives to be developed to improve the global rural experience. Results show that an integrated approach of tourism development has already been implemented, although there is still potential to explore the existing cultural resources to improve the tourism experience in this village, with all groups interviewed recognizing the attractive value resulting from the combination of traditions and co-creation experiences.

Key Words: Rural Tourism; Cultural Creativity; Schist Villages; Tourism Experience; Creative Tourism.

Introdução

Atualmente, o turismo cultural constitui um dos mais atrativos tipos de turismo (WTO, 2004). No contexto particular das áreas rurais, a questão da autenticidade, frequentemente associada a nostalgia, é um fator motivacional das visitas de

carácter cultural. As tradições, os costumes e a identidade local são recursos endógenos valorizados por parte de alguns dos turistas rurais (Kastenholtz, 2010; Walmsley, 2003). Contudo, o turismo cultural tradicional, por si só, já não é suficientemente atrativo (Richards, 2011). A criatividade aparece,

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então, como conceito promissor na reformulação da cultura tradicional através da reinvenção do passado e da otimização das ofertas do turismo cultural atual, potencialmente contribuindo também para a inovação do turismo em destinos rurais (Cloke, 2007; Mitchell & Fisher, 2010).

O presente estudo reporta resultados de um estudo qualitativo, exploratório desenvolvido no contexto de um Projeto de Investigação (ORTE¹), a partir do qual se tentou compreender a dimensão cultural da experiência turística vivida e co-criada em Janeiro de Cima, uma Aldeia do Xisto, do Interior de Portugal, identificando elementos que podem ser integrados em produtos turísticos co-criativos visando uma experiência turística global atrativa e envolvente. No presente artigo, é apresentada, inicialmente, uma breve reflexão sobre a ligação entre cultura, criatividade e a experiência turística rural. O estudo de caso apresentado ajuda a identificar elementos específicos da experiência de turismo rural cultural, assim como a forma como estes elementos são percebidos pelos vários *stakeholders* do destino. Este estudo envolveu análise documental, observação de campo e entrevistas a todos os *stakeholders* envolvidos na experiência turística. Por fim, são apresentadas implicações para possíveis estratégias de turismo criativo.

2. Do Turismo Cultural ao Turismo Criativo

A vertente cultural dos destinos turísticos é uma mais-valia transversal na indústria turística. De acordo com a OCDE (2009), o turismo cultural registou, em 2007, 360 milhões de viagens internacionais de turismo, correspondendo a 40% do total destas viagens a nível mundial. De acordo com Richards (2012), os turistas culturais gastam, em média, três vezes mais do que outros turistas, pelo que importa compreender este tipo de turismo em prol da maximização dos seus benefícios, tanto para os territórios como para a indústria turística e os próprios turistas.

A cultura assume um papel reconhecido na competitividade de um destino, não estivesse a cultura intimamente ligada à identidade local, constituindo a diferenciação cultural um fator de distinção significativo no mercado (Richards, 2010). A articulação entre cultura e turismo reforça, assim, as mais-valias de um local enquanto destino turístico.

Perante um crescimento expressivo do turismo cultural no século XX (ETC, 2005), vários locais definiram-se como destinos turísticos devido ao reconhecimento da sua herança cultural. Este processo foi acompanhado pelo desenvolvimento de estratégias de marketing direcionadas para

os turistas culturais. Contudo, este crescimento resultou, também, num fenómeno de turismo de massas, o que levantou questões relativas à sustentabilidade de um turismo cultural com “reprodução em série” (Richards, 2009). A massificação da procura, juntamente com a estandardização dos produtos turísticos e a falta de criatividade na captação de turistas transformaram-se em ameaças à preservação da identidade cultural de um local e da respetiva comunidade. Esta preocupação decorre da consciencialização relativa à importância de se conservar a singularidade e as qualidades inatas dos destinos, assim como de dar à cultura um papel dinâmico no desenvolvimento de um determinado local (Richards & Wilson, 2007b).

Especificamente no turismo cultural passou-se de uma abordagem quase exclusiva de valorização dos elementos tangíveis do destino (como património arquitetónico, museus, monumentos) para o enaltecimento dos elementos intangíveis (como identidade, estilo de vida, tradições) (OCDE, 2009; Richards & Wilson, 2007b), considerados centrais na promoção e diferenciação dos destinos turísticos.

De acordo com a Associação Atlas (*Atlas Research*, citado por Richards, 2009: 11), os turistas culturais procuram destinos que se caracterizam como “locais em menor escala e menos visitados, que oferecem a experiência da cultura ‘autêntica’ e ‘local’”. Ao longo do século XX, os turistas passaram a ser mais exigentes, começando a procurar experiências durante as férias, de forma a desenvolverem as suas competências e assumirem um papel ativo, experienciando a verdadeira cultura de um local e passando a conhecer melhor a sua identidade (Chambers, 2009; Fernández, 2010). Do ponto de vista da oferta, os agentes começaram a perspetivar a cultura como fator potenciador da atratividade turística (Richards, 2009). Os novos padrões de procura requerem novos produtos culturais, em que a autenticidade, a inovação e a criatividade se interligam e permitem a reformulação do turismo cultural, proporcionando uma variedade de produtos turísticos que permitem a autoexpressão dos turistas, a aprendizagem e a compreensão da identidade dos lugares, conferindo mais valor e significado às suas experiências. Esta experiência no destino pode ser melhorada através da interação entre a comunidade (transmissor de cultura) e os turistas (Binkhorst, 2007; Richards, 2011), interação particularmente relevante para o turismo rural (Kastenholz *et al.*, 2013b).

A criatividade, por sua vez, assume um papel vital enquanto elemento distintivo da experiência turística, capaz de satisfazer as expectativas de um público cada vez mais interessado em viver novas experiências relacionadas com o local e a comunidade que visitam. O turismo criativo evidencia

a componente cultural do destino, contribuindo simultaneamente para a criação de novas atividades turísticas que aumentam o envolvimento do turista com o mesmo. O turismo criativo tem sido identificado como uma extensão do turismo cultural, em que os consumidores procuram experiências interativas e dinâmicas, refletindo um novo perfil de turista cultural (Tan *et al.*, 2013).

Neste contexto, a criatividade deve ser entendida como motor de transformação dos setores económico e social de um determinado local, assim como de estímulo à criação de processos de inovação (Richards & Marques, 2012). No setor cultural, a criatividade permite o desenvolvimento de novos produtos culturais, adaptados aos desejos dos visitantes, estimuladores do potencial cultural de um local (Richards & Wilson, 2006; Richards, 2011), através de experiências turísticas inovadoras, flexíveis e de difícil reprodução (Alvarez, 2010). De acordo com Tan *et al.* (2013), o turismo criativo tem tido diversas interpretações no contexto mundial, existindo formatos distintos na Nova Zelândia, Áustria, Espanha, E.U.A., Canadá e Taiwan, mas com diversos pontos de contacto, nomeadamente ao nível da “participação ativa”, das “experiências autênticas”, do “desenvolvimento de potencial criativo” e do “desenvolvimento de competências” (Richards, 2011: 1237). É ainda salientado que a concretização das experiências criativas assentam frequentemente em atividades do dia-a-dia das comunidades, nomeadamente ao nível do “artesanato, da gastronomia, da criação de perfumes, da pintura em porcelana e da dança” (Richards & Wilson, 2006: 1219).

A primeira menção ao conceito de turismo criativo surgiu em 1993, por Pearce & Butler que reconheceram o seu grande potencial (Tan *et al.*, 2013). O turismo criativo foi definido por Richards & Raymond (2000, citado por Richards & Wilson, 2006: 1215) como o “turismo que oferece aos visitantes a oportunidade de desenvolverem o seu potencial criativo através da participação ativa em cursos e experiências de aprendizagem, associadas ao destino de férias onde se encontram”. A UNESCO (2006) define turismo criativo como requerendo uma interação mais expressiva entre o visitante e a comunidade local, com um envolvimento profundo ao nível emocional, educacional e social entre ambas as partes. Raymond (2007: 145) reforça estas ideias invocando:

“Uma forma de turismo mais sustentável que proporciona uma sensação de autenticidade relativamente a uma cultura local, através de workshops informais, com uma forte componente prática e através de experiências criativas. Os workshops decorrem em pequenos grupos em casa ou no local

de trabalho dos formadores; estes permitem aos visitantes explorar a sua criatividade durante o processo de aproximação à comunidade local”.

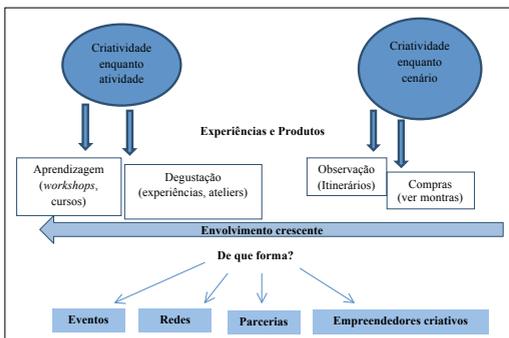
Apesar da diversidade de definições, devem ser realçados aspetos comuns como a referência: ao “potencial criativo” do visitante na comunidade visitada, desenvolvido de acordo com a oferta local e a atitude dinâmica do próprio visitante; ao seu “envolvimento ativo” com a comunidade recetora; à vivência de “experiências únicas” potenciadoras de memórias, integradoras de sensações, e à “co-criação”, uma participação ativa do visitante no destino, em que este procura ser coprodutor da sua experiência, adequando-a às suas próprias necessidades e exigências (Richards, 2011: 1237). O turismo criativo impulsiona, desta forma, o desenvolvimento de experiências únicas em que o cunho pessoal de cada visitante proporciona, por um lado, o usufruto de momentos únicos, concebidos à medida de cada um, e por outro lado, uma maior compreensão do significado dos valores, vivências e cultura locais, permitindo assim a aquisição de novas competências. Tendo em conta o papel interventivo do visitante nas experiências criativas, Tan *et al.* (2013: 165) salientam a importância de se considerar a perspetiva do visitante, sugerindo, nesta ótica, um modelo de experiência criativa que contempla as dimensões: “consciência”, “motivação”, “criatividade” e “aprendizagem e interação”. As três primeiras são englobadas nas “reflexões internas”, enquanto a última dimensão se enquadra nas “interações externas”, onde estão contemplados aspetos como o ambiente, as pessoas e o produto/serviço, que influenciam a experiência criativa do turista. Estes autores consideram também que o desenvolvimento da consciência social, cultural, ambiental e até pessoal é um pré-requisito básico para que o turista possa tirar partido, na íntegra, das experiências que lhe são proporcionadas pelo turismo criativo, determinando, assim, a propensão para se envolver na experiência co-criativa. A conceptualização do turismo criativo está, deste modo, muito próxima das sugestões do marketing e do turismo de experiências que enfatizam a “co-criação” e o envolvimento do consumidor na experiência vivida como fatores centrais de atração e satisfação do turista.

Sendo considerado por vários autores como uma evolução do turismo cultural “no sentido do alcance de experiências mais autênticas e que subentendem um maior envolvimento” (D’Auria, 2009, citado por Richards, 2011: 1239), o turismo criativo tem sido percecionado como a expressão do processo de mudança do turismo de massas para um turismo “feito à medida”. É também identificado por alguns

(Richards & Wilson, 2007a; Richards, 2009, 2012) como uma nova faceta do desenvolvimento cultural de um local, ao mesmo tempo que a cultura é vista como a matéria-prima para a produção criativa. Os autores referem-se a estas matérias-primas, com base, não só nos elementos tangíveis, como também nos intangíveis (Maitland, 2007), como por exemplo os estilos de vida e costumes das comunidades locais (Richards, 2011). Assim, recomenda aos prestadores de serviços turísticos que contemplem, na oferta turística, matérias-primas que permitam aos visitantes experiências que desenvolvam as suas competências, levem a auto-realização bem como ao conhecimento aprofundado acerca da comunidade local (Richards, 2011). O autor enfatiza a importância das “*competências específicas do local*” para o turismo criativo e o papel das comunidades locais, perspetivando a comunidade local como “*uma fonte de conhecimento e competências a partir da qual os turistas podem aprender*” (Richards, 2011: 1238).

O turismo criativo abrange, atualmente, um conjunto diversificado de atividades, com maior ou menor nível de envolvimento do visitante (Richards & Marques, 2012), podendo traduzir-se através de diferentes formas: i) “*envolvimento dos turistas no estilo de vida criativo do destino*”; ii) “*usufruir dos recursos existentes*”; iii) “*fortalecimento da identidade local e do seu carácter distintivo*”; iv) “*autoexpressão*”, assim como “*aprendizagem*”; e v) como forma de “*recriar e reviver os lugares*”, nos quais se pode gerar um ambiente criativo contextualizado (Richards & Marques, 2012: 4). Esta nova abordagem salienta o facto de a troca de ideias e competências entre visitantes, fornecedores de serviços e comunidade local se traduzir num enriquecimento para todos os envolvidos e num aprimorar das relações, consideradas, por Richards (2012), verdadeiramente autênticas.

Figura 1. “Formas de Turismo Criativo”



Fonte: adaptado de Richards (2011: 1239)

A Figura 1 demonstra a diversidade de expressões que o turismo criativo pode assumir, envolvendo maior ou menor interação do visitante. Este modelo de Richards (2011) evidencia o carácter eclético deste tipo de turismo, o que representa uma mais-valia para os destinos turísticos, que podem adaptar os respetivos recursos endógenos ao turismo criativo.

Defende-se que experiências turísticas de sucesso resultam da consciência dos visitantes relativamente às características únicas do destino, do seu envolvimento com a comunidade local e do desenvolvimento integrado da experiência turística. Por sua vez, o destino também deve escolher cuidadosamente os aspetos criativos mais identitários desse local com maior potencial de atração turística bem como apostar nas competências específicas da comunidade local (Richards, 2011). Cada destino tem o potencial para oferecer uma combinação única de recursos e competências que tornam determinados locais particularmente adaptados ao desenvolvimento de atividades criativas específicas, muitas vezes ligadas às respetivas tradições criativas.

Importa identificar e difundir os benefícios económicos do turismo criativo para as comunidades locais para reforçar a aposta conjunta nesta abordagem. Uma análise dos impactes económicos das indústrias culturais em Santa Fé (UNESCO, 2006) permitiu demonstrar formas de promoção da economia local recorrendo ao turismo criativo, das quais se destacam as seguintes: apostar na formação criativa de habitantes locais para criar produtos únicos; gerar novos empregos no setor do turismo criativo; desenvolver as infraestruturas locais; fortalecer políticas de suporte ao desenvolvimento do turismo criativo, tanto por parte do setor público, ao nível da criação de condições propícias a esse desenvolvimento (nomeadamente com incentivos fiscais, acesso a crédito bancário e formação), como por parte do setor privado, ao nível da promoção e aposta na qualidade, bem como na articulação em rede entre os setores público e privado.

O potencial papel vital do turismo criativo no desenvolvimento local é também destacado no Relatório de Economia Criativa das Nações Unidas (United Nations, 2008) que menciona como mais-valias proporcionadas pelo turismo criativo: a obtenção de lucro, o aumento dos postos de trabalho, o desenvolvimento da diversidade humana e cultural, a promoção da inclusão social, a integração de dimensões económicas, culturais, sociais e tecnológicas, a propriedade intelectual, o reforço do turismo, o desenvolvimento de indústrias criativas, assim como a promoção da inovação e de políticas que estimulam respostas inovadoras

e multidisciplinares face às exigências impostas por uma economia global competitiva.

Ressalta, assim, o papel inovador, distintivo e vital que o turismo criativo pode assumir no panorama atual da indústria do turismo, não só em termos de recuperação e revalorização da identidade dos locais e dos seus valores culturais, mas também como motor de desenvolvimento económico dos territórios e propulsor da atração de um perfil de turista mais envolvido, mais interessado na aprendizagem e na interação com o contexto de visita.

Considera-se, portanto, pertinente compreender o papel do turismo criativo no contexto dos destinos rurais, como forma de impulsionar estes território e a sua oferta local.

3. A Criatividade e a Experiência Turística Rural

É reconhecida a necessidade de promover o caráter único e diferenciador dos destinos, inseridos num mercado altamente competitivo. Como anteriormente argumentado, o turismo criativo destaca-se como elemento promotor desta diferenciação e competitividade dos destinos.

As novas relações entre as áreas urbanas e rurais transformaram as realidades sociais e culturais, impondo constantes reconstruções, adaptações e mudanças nas áreas rurais (Pereiro, *in press*). Os espaços rurais são hoje reconhecidos como espaços de consumo, tendo sido alvo de uma transformação em que o turismo ganha importância, não só pelo potencial de desenvolvimento que confere a áreas de menor densidade populacional, como também pela crescente procura que regista, por parte dos visitantes que procuram novas experiências em contexto cultural e natural (Kastenholtz, 2010; Figueiredo *et al.*, 2013; Walmsley, 2003).

Como referido anteriormente, os recursos destas áreas devem ser percecionados como elementos diferenciadores do território e necessitam, na sua maioria, de maior valorização. A criatividade pode, neste contexto, constituir-se como a base para os negócios turísticos de pequena escala (Richards, 2011), os quais detêm maior representatividade nas áreas rurais. Tal como é mencionado por Cloke (2007), atividades económicas sustentadas numa oferta criativa e diversificada são cruciais para relançar o desenvolvimento económico local nas áreas rurais. Estas oferecem uma diversidade de oportunidades para a concretização de experiências criativas, em que o dinamismo, o envolvimento e a procura de conhecimento são passíveis de encontrar expressão em atividades diversificadas, como por exemplo, no agroturismo, na gastronomia, na

fotografia, em que a interação entre residentes e visitantes pode contribuir para uma melhoria da experiência turística global (Binkhorst, 2007; Williams, 2007), vivida como única e distintiva (Fernández, 2010). O sucesso do turismo criativo está intimamente ligado aos recursos tangíveis e intangíveis dos destinos rurais, ao grau de envolvimento do visitante com a comunidade local e à oferta de atividades que possibilitem a concretização de experiências personalizadas e a construção de momentos únicos. De acordo com Kastenholtz *et al.* (2012a), as áreas rurais apresentam um particular potencial enquanto palco de um tipo de turismo personalizado, com forte expressão da dimensão cultural, numa perspetiva de turismo de experiências, em que o turismo criativo se assume como manifestação adequada ao próprio contexto rural, que o turista “pós-moderno” procura viver de modo “autêntico”.

De acordo com Richards & Wilson (2007b), as áreas rurais têm vindo a tornar-se espaços criativos devido à perceção dos urbanos destes espaços enquanto refúgios criativos, à propensão destes locais para a localização de *clusters* criativos (desenvolvimento de espaços para artistas rurais) e à crescente diferenciação entre o urbano e o rural.

De acordo com Richards (2012), a procura crescente de experiências criativas está relacionada com a necessidade de o próprio consumidor procurar a sua identidade e se expressar através de atividades que exigem o seu envolvimento e participação ativa. Kastenholtz *et al.* (2012b) sugerem, neste âmbito, que se aproveitem temas particulares, identitários destes territórios e da vida das suas comunidades para permitir uma experiência vivida como mais ‘autêntica’, no sentido da “autenticidade existencial” (Wang, 1999), tornando a experiência turística mais significativa e memorável. Segundo Richards (2009), as atividades criativas contribuem para melhorar o produto turístico, assim como a experiência vivida pelo turista. A experiência de aprender, saborear e observar pode ser concretizada através de *workshops*, ateliers, itinerários e atividades ligadas à dança, ao teatro, à pintura, à fotografia, à literatura, à música, ao restauro, à história, ao património, à arquitetura, à gastronomia ou ao artesanato, ilustrando a diversidade de abordagens de experiências co-criativas crescentemente procuradas pelos turistas (Binkhorst, 2007; Cloke, 2007). É, efetivamente, a experiência criativa que se converte em recordação numa etapa pós-viagem. Por outro lado, o desenho de iniciativas de turismo co-criativo, adaptadas às características e aos valores identitários locais (Raymond, 2007), contribuem para uma melhor diferenciação da oferta do destino rural, um reforço da sua identidade territorial, e

assim para um desenvolvimento turístico mais sustentável (Kastenholz *et al.*, 2012a).

A experiência turística, particularmente em contextos rurais, é complexa e não restrita aos aspetos funcionais; inclui dimensões sociais, emocionais, hedónicas e simbólicas e é mediada pelos sentidos (Kastenholz, *et al.*, 2012a,b). No contexto das atividades criativas, a experiência sensorial é particularmente importante, uma vez que permite um envolvimento mais profundo (Richards & Wilson, 2007a). O olfato e o paladar estão fortemente associados, por exemplo, à gastronomia, um valor identitário local muito importante para a co-criação de experiências rurais culturais, por exemplo nas atividades do enoturismo. As dimensões da visão, do tato e da audição permitem que os turistas façam parte da comunidade local, num contexto quotidiano (Richards, 2011). Nas áreas rurais, tal é possível através da observação dos residentes a trabalhar nas suas terras, da sensação das texturas do artesanato ou através da audição dos sons da natureza ou de outras vivências relacionadas com as atividades tradicionais (por exemplo, observação/acompanhamento dos trabalhos com animais nas quintas) (Kastenholz *et al.*, 2012b).

O caráter multifacetado da experiência do turismo rural e do turismo criativo requer, assim, um desenvolvimento integrado da co-criação de experiências culturais em áreas rurais, baseadas na interação com a comunidade, na preservação e no reconhecimento do valor dos recursos e saberes endógenos, o aproveitamento de temas identitários da vida/história dos territórios (Kastenholz *et al.*, 2012a) e uma aposta num envolvimento ativo ou numa imersão nos contextos de experiência (Pine & Gilmore, 1998). Tudo isso pode contribuir para melhorar a experiência turística e simultaneamente promover o desenvolvimento turístico rural sustentável, particularmente através de abordagens co-criativas articuladas em rede (Kastenholz *et al.*, 2012a; Mossberg, 2007).

O sucesso de experiências co-criativas depende, efectivamente, do envolvimento e da interação dos visitantes com os diversos elementos do sistema turístico: comunidade local, recursos e agentes da oferta (Richards & Wilson, 2007a; Richards, 2011). A comunidade local rural, percecionada como um veículo eficaz de transmissão da cultura local, pode participar ativamente como produtora de experiências turísticas rurais autênticas e contribuir para a transmissão de conhecimento, atuando, assim, como mediadora cultural (Kastenholz *et al.*, 2012b; Kastenholz *et al.*, 2013a; Richards, 2011).

Todas estas abordagens requerem uma total compreensão do contexto da experiência, o que se pretende ilustrar com o estudo de caso do destino rural apresentado seguidamente.

4. Metodologia

As experiências turísticas são um fenómeno complexo e subjetivo que envolvem um conjunto de interações entre pessoas, cultura e ideias que são partilhadas num espaço concreto (Cohen, 1979; McHenry, 2009). O presente estudo analisa diferentes dimensões desta experiência: os recursos de um destino cultural, a experiência vivida pelos visitantes, residentes, agentes da oferta e o contexto institucional que condiciona a experiência. Considerando-se este complexo objeto de estudo - a experiência turística - e a escassa investigação empírica publicada sobre, particularmente, a experiência turística co-criativa rural-cultural, foi escolhida uma abordagem qualitativa exploratória de estudo de caso. Esta permite obter dados ricos e detalhados (Mitchell & Fisher, 2010) que podem ajudar a compreender a experiência cultural vivida por todos os *stakeholders* envolvidos e o potencial existente para desenvolver alternativas co-criativas em prol da melhoria da experiência turística global no destino aqui analisado - Janeiro de Cima. Esta aldeia foi escolhida também devido ao caráter distintivo dos recursos culturais locais (num contexto local/regional) e ao papel recetivo da comunidade local para integrar e melhorar a experiência turística de quem visita a aldeia. A escolha da metodologia qualitativa permite, também, responder a especificidades mais concretas do local e da sua comunidade, aqui estudadas, também numa perspetiva de “pesquisa orientada pela ação” (Reason & Bradbury, 2008). Richards & Wilson (2007a) referem a metodologia qualitativa como muito adequada para a identificação do potencial co-criativo de um destino.

Após a análise dos recursos turísticos da aldeia, realizada através de uma análise documental e da observação *in situ*, foram realizadas entrevistas semiestruturadas para avaliar as perceções dos diferentes *stakeholders* (visitantes, população, agentes da oferta e instituições) sobre a experiência vivida na aldeia (Kastenholz *et al.*, 2012b).

No que concerne aos *stakeholders* em análise, foram entrevistados oito agentes institucionais, sete agentes da oferta local, onze residentes e doze visitantes acerca dos recursos locais existentes, da sua perspetiva sobre a experiência procurada e vivida pelos visitantes e de que forma esta poderia ser melhorada. Todas as entrevistas foram gravadas, transcritas e sujeitas a uma análise de conteúdo (Denzin, 1978). Posteriormente foi realizada uma análise comparativa, em que se pretendia identificar aspetos compatíveis e contradições entre observações, comparar os grupos de *stakeholders* e analisar as ligações entre os discursos e a revisão da literatura (McCracken, 1988; Mitchell & Fisher,

2010). Neste artigo exploram-se, particularmente, os discursos que referem a dimensão cultural e co-criativa da experiência rural vivida, condicionada e partilhada em Janeiro de Cima, por parte dos diversos intervenientes mencionados.

5. O estudo de caso – Janeiro de Cima

O contexto da aldeia

Janeiro de Cima é uma Aldeia do Xisto localizada no Interior Centro de Portugal, pertencente ao Município do Fundão. De acordo com dados do INE (2011), esta aldeia tem 306 habitantes, sendo uma das Aldeias do Xisto com mais população. O xisto, uma rocha metamórfica usada na construção tradicional na aldeia, confere a este território um carácter único. Além disso, o facto de pertencer à Rede das Aldeias do Xisto, inserida num programa de financiamento público destinado à preservação do património da aldeia, confere uma marca turística distintiva ao território. Janeiro de Cima destaca-se também pela construção tradicional que utiliza o xisto misturado com pedra rolada do rio, tal como ilustra a Figura 3.

Figura 3. Arquitetura da aldeia



Fonte: autoria própria

A Agência para o Desenvolvimento Turístico das Aldeias do Xisto (ADXTUR) detém, atualmente, a responsabilidade pela liderança da Rede das Aldeias do Xisto (rede na qual Janeiro de Cima se insere) em parceria com vinte e um municípios da região Centro e cerca de cem agentes privados (ADXTUR, 2008). O papel desta entidade privada sem fins lucrativos tem sido fundamental na gestão e promoção das Aldeias da rede, na cooperação entre os diversos agentes envolvidos, assim como na dinamização das aldeias, através de atividades e eventos que apelam ao envolvimento de todos os *stakeholders* locais (ADXTUR, 2008; Carvalho, 2009). No caso concreto de Janeiro de Cima, a ADXTUR tem desenvolvido uma ação revitalizadora neste território. A sua ligação a uma marca forte,

como é, de facto, a marca “Aldeias do Xisto”, tem permitido que Janeiro de Cima seja projetada e reconhecida no território português e no estrangeiro como uma aldeia que se destaca pelas suas características distintivas (Kastenzholz & Lima, 2013a; Lane *et al.*, 2013).

A aldeia de Janeiro de Cima está enquadrada num ambiente natural, com destaque para o rio Zêzere, tendo uma longa tradição na construção de barcos de rio, localmente designadas por “barcas” (Figura 4). O parque junto ao rio é um espaço de destaque na aldeia, atraindo muitos turistas no verão, assim como a realização de eventos.

Figura 4. Parque fluvial e barco de rio tradicional



Fonte: autoria própria

Outra atração importante de Janeiro de Cima é a Casa das Tecedeiras, um estabelecimento temático, que integra um museu, uma sala onde se encontra um tear, uma oficina de artesanato e uma loja, onde os visitantes podem experimentar a tecelagem, aprender sobre a história e as técnicas

Figura 5. Casa das Tecedeiras



Fonte: autoria própria

Figura 6. Festa de São Sebastião, em 2011



Fonte: autoria própria

tradicionais e ferramentas usadas para cultivar e trabalhar o linho (Figura 5). Esta casa é um espaço de excelência na aldeia que contempla vários elementos característicos da cultura local. A troca de conhecimentos e a aprendizagem são, igualmente, garantidos neste espaço, onde existe possibilidade de interação entre as tecedeiras, que são habitantes da aldeia, e o visitante.

Os elementos naturais e culturais são também a base do desenvolvimento de percursos temáticos que atravessam a aldeia e que tornam possível um contacto próximo com esses recursos através dos passeios a pé, de BTT, de carro e veículos *off-road* (ADXTUR, s.d.). Ao nível das festividades religiosas, destaca-se a Festa de São Sebastião (Figura 6), uma festa com uma grande importância para os atuais e ex-residentes da aldeia, aqueles que vivem noutros países, mas que regressam a Janeiro de Cima para viver esta festividade que decorre a 20 de

Janeiro. Esta festa religiosa, em honra do padroeiro da aldeia, assinala um tributo a D. Sebastião que, segundo a lenda, ajudou a combater a praga em Janeiro de Cima.

O nome *Janeiro de Cima* provém, segundo a lenda, da seguinte situação: um senhor, proprietário de uma grande quantidade de terras nos dois lados do rio Zêzere, legou essas propriedades aos dois filhos, ambos com o mesmo nome, Januário, o que levou ao surgimento de duas localidades diferentes – Janeiro de Cima, localizada na margem esquerda e Janeiro de Baixo, na margem direita do rio.

A gastronomia e os produtos locais (artesanato, linho e produtos agrícolas, como a cereja, o azeite, as castanhas), quatro unidades oficiais de alojamento de turismo rural, um restaurante e um bar são outros elementos potencialmente enriquecedores para a experiência turística nesta aldeia².

Os Agentes de Planeamento e Desenvolvimento Turístico

Diferentes agentes de planeamento e desenvolvimento turístico (APDT) foram entrevistados separadamente: dois representantes do pelouro do turismo da Câmara Municipal, dois representantes da Entidade Regional de Turismo – Turismo Serra da Estrela, o Presidente da Junta de Freguesia de Janeiro de Cima, dois agentes responsáveis pelo ADXTUR e um dos responsáveis por uma Associação Regional para o Desenvolvimento Rural (ADERES - um antigo grupo LEADER com uma ação importante a nível local). Estes agentes realçam o património imaterial (a cultura local, as tradições, a gastronomia) e algumas características físicas (a arquitetura, a combinação pedra de xisto/pedra rolada) como recursos de grande valor, os quais contribuem de forma decisiva para a diferenciação desta aldeia relativamente a outras na Rede de Aldeias de Xisto. Consideram, igualmente, a reconstrução e preservação do património arquitetónico algo essencial para atrair visitantes, o que enaltece os materiais e a riqueza identitária arquitetónica da aldeia. De acordo com um APDT, *“o principal elemento atrativo é, acima de tudo, a preservação/recuperação do edificado”* (ADPT3). O parque junto ao rio, a Casa das Tecedeiras e o artesanato local são elementos distintivos igualmente valorizados. Alguns agentes também mencionam *“a barca”* como um recurso local que deve ser recuperado e introduzido na experiência turística, enquanto *“algo que marca / faz a diferença”* (APDT2) e promove o envolvimento dos visitantes com a cultura local. Reconhecem, também, que estes recursos são uma base extraordinária a partir da qual podem desenvolver-se diferentes tipos de experiências *“através desta reinvenção e articulação de produtos (...) sempre com uma forte ligação à terra, às tradições e à identidade da comunidade”* (APDT3).

Os APDT consideram, também, que os visitantes esperam experienciar o contacto com um modo de vida autêntico, com pessoas hospitaleiras, com boa comida e proximidade da natureza: *“Os turistas também valorizam a descoberta, um turismo ativo e de natureza, um turismo familiar (...) e boa gastronomia”* (ATPD3). Estes elementos podem, de acordo com estes atores, integrar-se em experiências dinâmicas e genuínas diversificadas, envolvendo visitantes e residentes. Os agentes reconhecem que algumas características da aldeia devem ajudar a melhorar a qualidade da experiência turística e demonstram ter uma perspetiva focalizada na vertente criativa do destino, sugerindo a implementação de procedimentos inovadores: *“revolucionámos tudo o que estava a ser feito no campo cultural nesta região: aproximámos*

procedimentos bastante tradicionais com outros mais contemporâneos, o que resultou em produtos e interpretações novas, diferentes e diferenciadoras” (APDT2). Outras melhorias sugeridas como essenciais foram a promoção da gastronomia local, enquanto característica identitária, a melhoria da formação dos prestadores de serviços, assim como a consciencialização dos residentes para a importância da promoção das atrações locais. Um dos agentes menciona a necessidade de se estabelecer uma ligação entre todos os serviços da aldeia, como forma de promover uma *“cultura empresarial”* (APDT2). Isto pode ser crucial para o desenvolvimento de novos produtos criativos, reinventando o passado com base na identidade local e reforçando, assim, a qualidade e distinção da experiência integral em Janeiro de Cima. Neste contexto, a ADXTUR destaca-se enquanto rede de desenvolvimento do turismo centrada na qualidade. Ainda no âmbito do planeamento estratégico, o papel marcante da cultura local é reconhecido como promotor de diferenciação e de um desenvolvimento integrado, uma vez que *“os modelos de governança implementados, relacionados com um planeamento integrado e em rede, e a criatividade aplicada aos recursos rurais”* (APDT2) são vistos como chave para o sucesso da estratégia turística. Os APDT são otimistas relativamente ao futuro da região, desde que se utilizem, de forma estratégica, os recursos distintivos *“para alargar a oferta e criar novos produtos”* (ATPD3).

Os Agentes da Oferta Turística

As entrevistas semiestruturadas foram aplicadas a sete Agentes da Oferta (AO): o restaurante “Fiado”, o “Café Cardoso”, o “Café-Bar O Passadiço”, a “Casa de Janeiro” (alojamento local), a “Casa das Tecedeiras” e dois minimercados na aldeia.

Os AO também salientam o papel distintivo da arquitetura e dos materiais usados como elementos de maior diferenciação da aldeia. A Casa das Tecedeiras é considerada um importante elemento histórico da aldeia, permitindo a interação entre os produtores locais, a comunidade e os visitantes, assim como a transmissão de conhecimento, o conhecimento ativo e a descoberta da identidade local: *“Acho que é interessante, porque as pessoas podem experienciar a tecelagem e todo o processo”* (AO7). Os agentes vêem este espaço temático essencialmente como importante elemento distintivo da aldeia através dos produtos de linho, os quais são, no seu ponto de vista, muito procurados pelos visitantes. Os agentes concordam ainda que os visitantes procuram queijo regional, enchidos e mel. As barcas, produzidas de forma artesanal, são também mencionadas, apesar de não serem

ainda usadas com propósito turístico ou promovidas como atração.

De acordo com estes agentes, os visitantes esperam estar próximo da comunidade local, querem aprender acerca e experienciar as tradições locais, assim como entender o modo de vida dos locais. Procuram, na sua perspectiva, também a genuinidade. Um dos agentes refere: *“Este casal disse-me que passaram todo o dia na aldeia, visitaram o santuário de São Sebastião... e conversaram com os agricultores, fizeram-lhes perguntas acerca da agricultura... não têm este tipo de contacto no local onde vivem e ficaram impressionados com o entusiasmo da população local e o orgulho que demonstraram ao promover os seus produtos locais... é um sentimento de satisfação pessoal”* (AO1).

Estes agentes realçam a falta de informação acerca das atrações locais como um dos principais aspetos a melhorar. Sugerem, também, a revitalização do parque junto ao rio, enquanto atração da aldeia durante todo o ano (em vez de apenas no verão), sugerindo o seu uso para desportos de água e atividades de contacto com a natureza, recorrendo-se, por exemplo, à barca tradicional. Ressalvam, porém, que são a favor do desenvolvimento do turismo apenas numa perspetiva sustentável, com estratégias que considerem sempre os níveis de saturação da população.

Reconhecem, também, a importância do trabalho em rede para ganhar visibilidade no mercado, referindo igualmente técnicas inovadoras de comercialização, como os pacotes de experiências que contribuem para que o alojamento local tenha acesso ao mercado. Um dos agentes sugere ainda o trabalho em rede com agricultores locais, como forma de promoção da agricultura e dos produtos locais.

A Comunidade Local

No que concerne às entrevistas aplicadas à comunidade local, dos onze entrevistados, oito são mulheres, com idades compreendidas entre os 20 e os 34 ou os 40 e os 59 anos de idade. Sete destes entrevistados, ou seja, cerca de metade desta amostra, têm um nível médio de formação e é profissionalmente ativo, sendo que a maioria trabalha no setor dos serviços, fora da aldeia. A restante amostra é constituída por três desempregados e um estudante.

Os residentes concordam com os restantes agentes, relativamente à identificação das principais atrações da aldeia: a arquitetura, o xisto, o rio e o parque envolvente, assim como toda a atmosfera da aldeia, na qual os produtos típicos e a Casa das Tecedeiras desempenham um papel importante, numa perspetiva de divulgação da tradição

artesanal da aldeia, considerada pelos mesmos como um elemento especialmente atrativo para visitantes urbanos. De acordo com um residente: *“a maior parte das pessoas vem da cidade e procuram realmente o que há de tradicional, portanto, o nosso artesanato”* (P2), com destaque para o linho e os produtos fabricados na Casa das Tecedeiras, que são valorizados pelos visitantes. Referem ainda a gastronomia rica e variada enquanto elemento distintivo, apesar de não explorado na totalidade com propósitos turísticos. A maioria dos residentes menciona os produtos agrícolas como algo que tem vindo a ser cada vez mais procurado pelos visitantes, ainda que não devidamente promovido e integrado na oferta turística. Sugerem a criação de uma rede entre agricultores, o restaurante e outros serviços da aldeia, como incentivo ao consumo e à venda de produtos agrícolas locais. Este facto contribuiria, na perspetiva da população local, para ajudar os residentes mais idosos, que dependem de pensões baixas. O conceito de trabalho em rede é também sugerido para funcionar entre aldeias, visto que as visitas a Janeiro de Cima não são realizadas de forma isolada, isto é, os visitantes visitam aldeias vizinhas, muitas vezes a pé, como forma de conhecer este território. Apostar no trabalho conjunto é, de facto, premente, podendo contribuir-se para a otimização da experiência turística pela integração dos recursos distintos e mais apelativos dos locais próximos.

A maioria dos residentes considera crucial o desenvolvimento de atividades que complementem as visitas, como forma de se promover um melhor envolvimento dos visitantes e de os levar a passar mais tempo na aldeia. Um dos residentes sugere o envolvimento da comunidade na atividade turística para se criarem relações mais dinâmicas entre comunidade recetora e visitantes. Também os residentes consideram o rio e o parque elementos distintivos importantes que devem ser usados para criar experiências de lazer mais dinâmicas, como por exemplo através dos desportos de água, referindo, simultaneamente, a integração dos barcos de rio tradicionais e a eventual exploração dos moinhos de água, os quais devem ser restaurados, revitalizando-se, assim, mais uma tradição do passado: *“um turista vem e diz assim: é pá, como é que isto funcionava? Aquilo nem dava lucro mas por exemplo, uma pessoa ocupava-se, punha lá a fazer um bocadinho de milho e estava lá um moleiro, aquela figura da aldeia, sabiam o que era um moleiro”* (P6). Os residentes mostram, desta forma, a sua consciência relativamente aos elementos identitários locais que podem ser integrados de forma dinâmica nas atividades turísticas e que podem também promover relações de maior interação entre visitantes e residentes.

A maioria dos residentes confirma a já mencionada falta de informação disponibilizada aos visitantes, em particular no que diz respeito aos percursos pedestres e às tradições da aldeia, sendo eles próprios frequentemente questionados pelos visitantes sobre estes assuntos, e sugerem maior promoção dos mesmos. Tendo em conta que os visitantes procuram produtos genuínos e autênticos quando visitam a aldeia, os residentes, simultaneamente orgulhosos das tradições culinárias locais, mencionam que o restaurante deveria oferecer pratos mais tradicionais. No entanto, à semelhança dos AO, demonstram bastante preocupação com a necessidade de o turismo se desenvolver numa perspetiva sustentável, sem que se excedam as capacidades de carga social e ambiental.

Os Visitantes

A maioria dos doze visitantes entrevistados tem entre 22 e 39 anos de idade (cinco dos quais acima dos 50), tratando-se, sobretudo, de casais que viajam durante dois dias (apenas três são excursionistas). A maioria é oriunda de cidades médias do litoral do país e têm um nível de formação superior (licenciatura ou mestrado).

Os visitantes associam Janeiro de Cima à marca “Aldeias do Xisto”. Para além do xisto, enquanto elemento arquitetónico distintivo na aldeia, os visitantes apercebem-se das características particulares de Janeiro de Cima, relativamente a outras aldeias, através da utilização dada à pedra rolada, a qual é parte identitária da aldeia, na sua relação com o rio: “*este material é um revestimento que provém da natureza*” (T2).

Os visitantes revelam o seu desejo em conhecer o modo de vida da comunidade rural, assim como em desfrutar da atmosfera da aldeia, revelando o seu interesse em se envolverem com a comunidade local e emergirem numa realidade distinta. Os visitantes referem a simpatia da população local em os receber, enquanto elementos distintivos, o que contribui para a atmosfera agradável e genuína tão característica da aldeia.

Três turistas estrangeiros visitaram a aldeia com o intuito de participar num festival que decorre todos os anos no parque junto ao rio (*Raízes d’Aldeia*), em *workshops* e danças, o que reflete o desejo, por parte dos novos turistas, em se envolverem ativamente e interagirem com a comunidade local. Um deles salientou o prazer de estar próximo do rio: “*a principal atração é ter água a circundar o festival*” (T11). A experiência sensorial dos visitantes é também muito importante, sendo os principais sabores associados à aldeia o das castanhas, do prato típico maranhos e do cabrito. Os sabores da geleia de abóbora e da marmelada, assim como do

pão caseiro também foram mencionados. O cheiro da natureza, das flores, da vegetação e do ar fresco estão fortemente associados à experiência vivida nesta aldeia. Os sons da natureza (em contraste com os sons da cidade), incluindo o rio e o canto dos pássaros, as conversas familiares nas ruas da aldeia, o sino da igreja e, curiosamente, o silêncio são mencionados como os sons mais memoráveis. Os elementos visuais que os visitantes salientam incidem no verde das paisagens e no laranja acastanhado da arquitetura, assim como no rio e na vegetação.

A maioria dos visitantes esperava comprar produtos locais, principalmente especialidades locais/ regionais, tais como compotas, mel, enchidos e artesanato local, particularmente os produtos de linho da Casa das Tecedeiras, elogiados por um dos turistas pela qualidade excepcionalmente boa dos produtos de linho. Outro turista explicou que “*quando exploro este tipo de áreas, prefiro comprar mesmo produtos locais, como o mel*” (T11).

Os visitantes identificam, igualmente, aspetos que podem ser desenvolvidos para melhorar a sua experiência, fazendo referência, em particular, à informação para os orientar durante as visitas: “*não há folhetos, portanto uma pessoa não sabia, estávamos a meio do percurso e não sabíamos se era muito grande, muito pequeno... portanto, falta informação*” (T5). Notaram que a população local nem sempre teve capacidade para os ajudar, tendo sugerido a formação dos prestadores de serviços relativamente a informação sobre aldeia e arredores. Alguns visitantes mencionaram a dificuldade de acesso à internet na aldeia, revelando um sentimento contraditório relativamente à procura de autenticidade mas compatível com os padrões de modernidade da sociedade atual.

6. Discussão dos resultados e implicações

A postura dos *stakeholders* entrevistados em Janeiro de Cima revela que uma perspetiva integrada no desenvolvimento turístico já foi implementada, continuando a haver grande potencial para explorar recursos culturais, materiais e imateriais, como forma de melhorar a oferta turística da aldeia. Além disso, deve salientar-se o potencial de desenvolvimento de experiências turísticas co-criativas como forma de reforçar a experiência na aldeia no seu todo e de diferenciar esta Aldeia do Xisto, em particular (Richards & Wilson, 2006). Todos os *stakeholders* locais reconhecem a cultura como elemento central para estas experiências co-criativas. Os resultados corroboram a posição de Kastenholz *et al.* (2012b) e de Richards & Wilson (2007a), revelando que os visitantes também procuram uma postura mais ativa na produção das suas próprias experiências.

A Casa das Tecedeiras reflete a possibilidade de transformar um produto cultural tradicional num produto co-criativo, pelas suas características únicas, pois não só facilita a transmissão de conhecimento como também promove a produção de produtos de linho de qualidade, enquanto elemento identitário desta aldeia, embora a experiência possa ser aprofundada pela oferta de *workshops*. O papel desempenhado pela comunidade local e pelos visitantes neste processo é crucial para desenvolver ambientes de experiências em turismo criativo (Binkhorst & Dekker, 2009) que sejam vividas como mais “autênticas” (Kastenholz *et al.*, 2012a) e para satisfazer o desejo dos turistas em conhecerem e se envolverem na cultura local (Chambers, 2009; Cloke, 2007; Fernández, 2010; Richards, 2011; Kastenholz *et al.*, 2013b). A relevância destas atividades partilhadas na experiência turística vivida em Janeiro de Cima destaca a função e o potencial de um uso co-criativo da Casa das Tecedeiras, podendo-se, neste âmbito, promover a combinação de tradições com um novo *design* e usos mais contemporâneos, estimulando assim a criatividade dos atores envolvidos. Surpreendentemente, todos os grupos entrevistados reconhecem a combinação entre o tradicional e o contemporâneo como elemento de grande atratividade, e chega mesmo a ser percecionado como fator de orgulho local, por parte dos agentes da oferta e dos residentes que reconhecem esta combinação no restauro de muitos dos edifícios mais emblemáticos da aldeia (como no caso da própria Casa das Tecedeiras, mas também do restaurante), bem como no seu conjunto edificado esteticamente apelativo. Iniciativas semelhantes, nas quais são usados recursos existentes e subaproveitados, podem ter potencial em Janeiro de Cima, uma vez que os visitantes revelam interesse em descobrir e apreciar a natureza, a agricultura em pequena escala e todos os produtos locais com que contactam. A disponibilização de informação acerca dos recursos e elementos atrativos é essencial, tal como é reconhecido pelos agentes da oferta, residentes e visitantes. Contudo, uma forma apelativa de o fazer é, não apenas através da tradicional informação impressa, mas também através de experiências co-criativas, envolvendo visitantes e residentes, nas quais os últimos desempenham o papel de “mediadores culturais” (Cloke, 2007; Kastenholz *et al.*, 2012b). Atividades temáticas e participativas poderão, assim, ser desenvolvidas com o envolvimento ativo de residentes preparados, através, por exemplo, de *workshops* em agricultura, em que se expliquem técnicas agrícolas e se mostrem os desafios da vida de agricultor ou cursos de gastronomia, tendo por base pratos típicos locais e produtos agrícolas locais/ regionais; ou peças de teatro, baseadas em lendas da aldeia (São Sebastião e os Januários – recursos não mencionados pelos

stakeholders entrevistados), nas quais o visitante possa participar ativamente. Também o rio poderia ser melhor aproveitado, enquanto palco de atividades dinâmicas, próximas da natureza, em conjunto com dois recursos tradicionais identificados pelos agentes locais e pelos residentes: a barca e os moinhos de água. Atividades como visitas guiadas no rio, de barca, podem ser oferecidas, nas quais um residente local dê a conhecer a importância do rio na vida da aldeia e responda às perguntas dos visitantes, criando-se, assim, uma interação personalizada entre a comunidade local e o visitante. O facto de um residente, eventualmente escolhido pela comunidade, assumir funções semelhantes às de um guia turístico, explicando a história e lendas da aldeia, preparado para receber os visitantes, até mesmo em mais do que uma língua, poderá ser, de facto, um valor acrescentado à experiência turística. O envolvimento dos residentes e dos visitantes poderia ser assegurado também através da produção de postais (através do registo fotográfico), em que a perspetiva de cada interveniente sobre a experiência turística na aldeia é o fator distintivo de valorização.

A história e as tradições locais devem ainda ser reconhecidas como elementos a valorizar em propostas de turismo co-criativo, podendo proporcionar o desenvolvimento de experiências turísticas memoráveis, significativas e envolventes, contribuindo, em simultâneo, para o aumento do sentido de identidade e até de autoestima da população e assim a um desenvolvimento social e culturalmente mais benéfico e sustentável da aldeia (Cloke, 2007; Mitchell & Fisher, 2010; Richards, 2011). O turismo co-criativo pode, efetivamente, constituir-se como uma mais-valia para a distinção do território, apesar de a sua concretização depender fortemente da ação e do interesse dos atores locais no desenvolvimento e integração deste tipo de ofertas em Janeiro de Cima.

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Notas

- Projeto de investigação de 3 anos (2010-2013), financiado pela FCT (PTDC/CS-GEO/104894/2008) que analisa, de modo holístico e interdisciplinar, a experiência global de turismo em meio rural vivida em 3 comunidades/territórios rurais, freguesias do Norte e Centro de Portugal, recorrendo a uma equipa de investigadores que representam diversas áreas científicas (ver <http://cms.ua.pt/orte/> e Kastenholtz *et al.*, 2014).
- Mais detalhes podem ser consultados em Lima *et al.* (2014), assim como no livro com o resumo dos resultados: Kastenholtz *et al.* (2014).

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Reseña de Publicaciones

Tourist experience: Contemporary perspectives

Sharpley, R. & Stone, P. (Eds.). Oxon, UK: Routledge (2011)

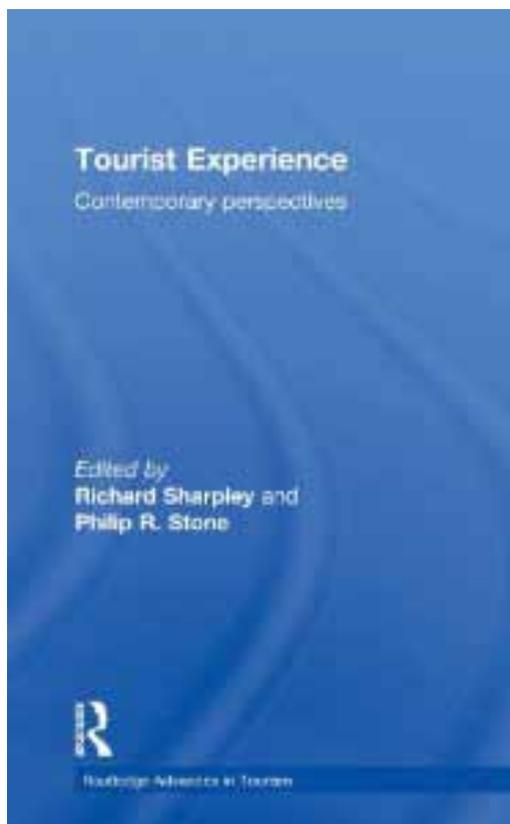
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The consumption of experiences has been acknowledged as a key research topic in tourism studies, since everything in a destination can be experienced by tourists, whether it be places, people, or activities. Along with changes in contemporary societies, continuous transformations in tourism both in scale and scope have led tourist experiences to become more complex and varied in their forms. In this vein, *Tourist Experience: Contemporary Perspectives* reflects on the diversified meanings attributed to the tourism experience by tourists through case studies representative of diverse geographical areas, in a multidisciplinary perspective. The compilation of research contributions from both academic and practitioner-based perspectives organized in eleven chapters offers an overview of current research themes, which are presented in five sections: dark tourism, poor places, sport tourism, writing and researching on the tourist experience.

The search for new experiences led tourists to places that some years ago have been thought as unusual destinations, such as the case of poor or *dark* places, somewhat associated with *authentic* areas to experience. In this context, dark tourism, also termed *thanatourism*, is approached as an institution mediating the dead and suffering and the living. A discussion on the label of “darkness” in tourism and the authenticity of the experience is provided along the two chapters dedicated to this theme. The potential of future research is



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highlighted since mortality has been historically related to art, literature and travel, involving not only meaning for the living but in some extend the gratification of the human senses.

From the perspective of social and cultural construction, in addition to the relationship between the individual and the place, the importance of the embodied experience is a sound and interesting topic connecting all chapters. Since sensory stimuli underlie the provision of satisfying environments for the consumption of tourism products and services, and boost human interactions, they are seen as appropriate for the planning of meaningful sensory tourist experiences. While encouraging responsible tourist experiences with respect to local resources and communities, sensory stimuli are also important markers for recollection.

This idea is especially evinced in the case studies of Millennium Stadium in Cardiff and Twickenham Stadium in London analyzed by Sean Gammon, who draws attention to the fact that sport sites are places to visit and sensorially experience rather than places where the event will take place. Whilst acknowledging that experiencing an *empty* stadium is different from experiencing an *awake* stadium, diverse sensory-informed markers can be managed. The desired outcomes are enhanced experiences for both the active and passive sport tourists and the development of the sense of identity, belonging, and attachment.

Since various forms of tourism, such as sports attraction tourism or rural tourism, became relevant and competitive markets, sensory stimuli can be explored not only with the aim to enhance tourist experiences in physical environments but also in virtual environments by using the potential of information and communication technologies in the different moments of travel. The role of new media in narrating travel experiences is especially emphasized in chapter 11 presented by Gretzel, Fesenmaier, Lee, and Tussyadiah. The anticipation and recollection stages of tourist experiences in addition to the *in loco* activity are seen as involving specific particularities that influence the type of use of consumer-generated media and mobile technologies by tourists who use them with the purpose of narrating their travel experiences. These forms of contemporary travel writing help tourists to enhance and add meaning to their experiences, document and share their stories with others, thus contributing to the process of cognitive and emotional attachment to products, brands and destinations. Hence, apart from being cultural and social constructions, these stories of encounters with locals, other tourists, and places go beyond the gaze, putting together all the bodily experience by including the non-visual senses along with sight.

While the diversity of ways of conceptualizing the tourist experience is explored in the first chapter by Chris Ryan, the last section of the book is dedicated to innovative and appropriate methodological approaches to researching tourist experiences. Mary Beth Gouthro stresses the importance of the advances in qualitative approaches in tourism research focused on revealing the phenomenological nature, richness and depth of tourist experiences. Martine Middleton highlights the senses as a means to differentiate culturally tourist experiences. The author suggests the use of Q methodology, which provides a numerical perspective on subjectivity allowing quantitative and qualitative understandings regarding tourist experiences. Responsible tourist behavior is explored in the last chapter by Davina Stanford, who considers the use of Kohlberg's Stages of Moral Development concept as an appropriate framework to research tourists' reactions to persuasive messages aiming at influencing their behavior.

Overall, the ultimate goals of the research compiled in this book by Richard Sharpley and Philip Stone are offering new insights on how to facilitate positive and memorable tourist experiences, regardless their form, and understanding the nature and complexity of the contemporary tourism experience. Emergent motivations, behaviors, and responses towards new destination experiences are analyzed, which adequately represents some of the latest research trends proving the reader with important recommendations for future studies.

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Reseña de Publicaciones

Food, Agri-Culture and Tourism. Linking Local Gastronomy and Rural Tourism: Interdisciplinary Perspectives

Sidali, K. L., Spiller, A. and Schulze, B. , Springer Link (2011)

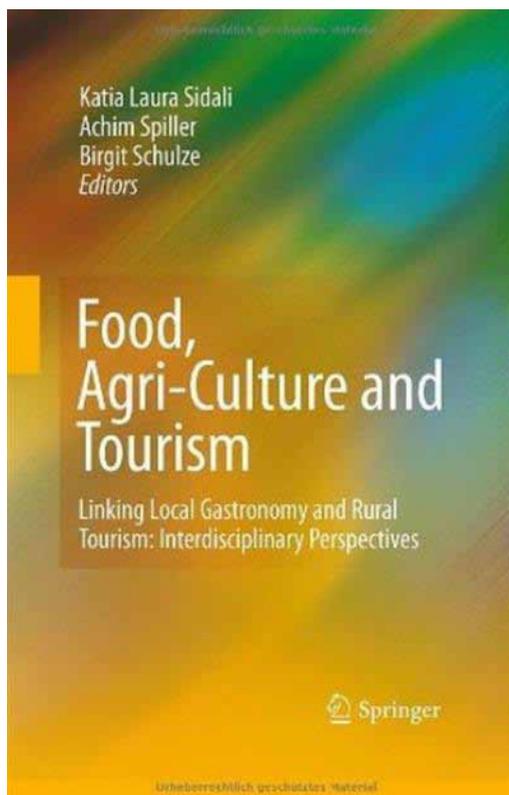
ISBN: 978-3-642-11360-4; 978-3-642-11361-1

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Food in promotional strategies of rural tourism has increasingly acquired significant role of a cultural signifier of place and its essence. By bringing together research on food and tourism industries, this book is a welcome contribution in furthering the work on this angle from an inter-disciplinary perspective. The book is neatly divided into three parts, namely, Part I: Farm and Rural Tourism; Part II: Food, Wine and Tourism; and Part III: New Avenues of Research: Online Marketing and Sensory Marketing. Each part contains well-researched and an array of case studies, but one of its key weakness is its Europe-centric focus.

The key emphasis of the text is on how tourists' desire to experience farm as a product can be further enhanced by "online and sensory marketing for fulfilling the needs of the new trends within this sector" (p. 20). In this respect, the main challenge remains on identifying the most appropriate advertising strategy. Stockebrand et al.'s case research on Germany underlining the need for emotions-based communication is particularly interesting as the authors also include a number of good practices that have made agri-tourism enticing by the virtue of story-telling that embodies a mix of romantic, succulent and poetic traits. The analysis is somewhat weakly presented and does not appear to elaborate in greater depth fascinating theoretical assertions made in the chapter. Bianchi's chapter that follows



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would have better served as an opening chapter to set the scene in Part I. Generally, authors generally agree on the lack of entrepreneurial traits among rural SME owners / managers that prevent them from benefiting the niche and profitable segment of wine tourism.

Focus of Part II is on exploring different facets of commercial interface between tourism and viticulture, including a relatively under-investigated theme of co-operative marketing and wine tourism. The case studies are relevant and well-researched and highlight a combination of techniques available to providers in crafting and selling unique forms of rural tourism experience and enterprise (e.g. linking wine routes to historical sites). Except one chapter by Santini et al., most chapters on marketing included in Part III fail to make adequate links with rural or wine tourism which is the overarching premise of the book and distract the reader. This is one of the key weaknesses of the book that could have been easily rectified with greater attention to the overall message that was being conveyed and accordingly defining chapter content. Also, at the start of each section, a summary outlining key themes and the general discussion would have helped the reader to have an improved understanding of the underlying logic behind the inclusion of individual chapters.

Despite these limitations, the book foregrounds the significance of designing “memorable experiences” (p. 171) to capture and retain tourists’ attention. Certainly, concepts like sensory marketing, sensory analysis as means to distinguish rural tourists are quite interesting and have the potential to be easily replicated in other case contexts. Given the rapid pace of change and the need for differential marketing strategies required for creatively packaging rural tourism, this work by Sidali and colleagues indeed sets the scene by depicting the plurality of approaches available to rural SMEs to augment consumers’ experience. However, critical discussion on how the marketed identity overlaps with the experienced identity as well as how the relational capital of owners / managers of rural SMEs impacts on the positional features of creativity, i.e. potential of a region to become a creative milieu would have been quite useful. Thus the book should be seen as an initial step to commence further enquiries into the way contemporary rurality is experienced, consumed and marketed.

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Reseña de Publicaciones

Reinventar o Turismo Rural em Portugal. Co-criação de experiências turísticas sustentáveis

Elisabeth Kastenholtz; Celeste Eusébio; Elisabete Figueiredo; Maria João Carneiro;
Joana Lima (Coords.). Aveiro. UA Editora (2014)

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O espaço rural português é muito heterogéneo mas, de uma forma geral, transformou-se profundamente nas últimas décadas. Regista-se um declínio da agricultura e uma perda mais ou menos acentuada de população e o envelhecimento das comunidades. Mas existem novas procuras centradas nos territórios rurais, com origem urbana, frequentemente dirigidas para os produtos agroalimentares de qualidade, a gastronomia, o lazer e o turismo. Estas procuras configuram alternativas às atividades tradicionais em declínio. Neste quadro, a aposta no turismo tende a ser moldada por discursos otimistas, que idealizam o rural e menosprezam os desafios da construção de experiências turísticas apelativas, integradas e sustentáveis.

Este cenário, que está longe de ser específico de Portugal, motivou uma equipa de investigadores das Universidades de Aveiro, Trás-os-Montes e Alto Douro, Nova de Lisboa e do Instituto Politécnico de Viseu, que deu forma e conteúdo ao Projeto ORTE – “A experiência global em turismo rural e desenvolvimento sustentável de comunidades locais”, financiado pela Fundação para a Ciência e Tecnologia, com cofinanciamento comunitário, e coordenado pela Universidade de Aveiro.

O Projeto assentou numa perspetiva holística e interdisciplinar e focou-se na compreensão da natureza e da dinâmica da experiência de turismo rural vivida e oferecida por três aldeias portuguesas do interior

Reinventar o Turismo Rural em Portugal

Co-criação de experiências turísticas sustentáveis



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Centro e Norte do país, em contextos diferenciados do ponto de vista geográfico, cultural, social, político e económico, integrantes de redes temáticas centradas no património e no desenvolvimento do turismo. Neste âmbito, olhou para as partes integrantes e essenciais da experiência turística, para as suas determinantes e condicionantes do ponto de vista dos atores envolvidos na sua “co-criação” (as populações, os agentes da oferta e planeamento e os visitantes), bem como para o potencial do seu desenvolvimento. Com tal abordagem, os investigadores procuraram dar um contributo para o desenvolvimento de estratégias e ações de desenvolvimento sustentável do turismo rural.

Desse Projeto nasceu o livro “Reinventar o Turismo Rural em Portugal. Co-criação de experiências turísticas sustentáveis”, editado pela Universidade de Aveiro (UA Editora), que, através das suas cinco partes e dez capítulos, nos resume o essencial do caminho percorrido ao longo de três anos de investigação e mostra os principais resultados obtidos, deixando ampla matéria para reflexão e pistas para a “co-criação de experiências turísticas rurais sustentáveis” e para futuros estudos.

A primeira parte do livro, correspondente ao capítulo 1, faz uma introdução geral à problemática, deixando o desafio de “reinventar o turismo rural em Portugal”, como forma de o sustentar. Na segunda parte, composta pelos capítulos 2 e 3, faz-se uma apresentação do Projeto ORTE, destacando-se os seus objetivos e a metodologia, e caracterizam-se os três destinos ruais em estudo. Sublinhe-se a solidez da metodologia, assente na combinação das abordagens qualitativa e quantitativa, cruzando a observação no local, a análise documental, entrevistas semiestruturadas, aplicação de questionários e realização de sessões públicas de partilha e debate de resultados.

A terceira parte, composta pelos capítulos 4 a 6, desenvolve a parte conceptual da investigação, analisando a “experiência turística no espaço rural”, o “desenvolvimento sustentável de destinos turísticos” e “o papel das redes no desenvolvimento de destinos rurais”. Um conceito central é o de “co-criação”, que aponta para o facto das experiências turísticas serem cocriadas por vários atores, incluindo os visitantes, os prestadores de serviços e os residentes locais. Como referem Kastenholz et al. no capítulo 4, inspirados em vários autores, “Num dado contexto institucional e geográfico, tanto os recursos endógenos dos territórios como, muitas vezes, os agentes da oferta e a própria população rural que partilham, condicionam e cocriam essa experiência, assumem um papel central”.

A quarta parte destaca os resultados empíricos da investigação, desdobrando-se pelos capítulos 7 a 9, a apresentação da experiência turística rural vivida e cocriada pelos visitantes, pela população das aldeias e pelos agentes da oferta e do planeamento.

Percebemos melhor nestes capítulos o carácter inovador da investigação, traduzido na sua perspetiva holística e interdisciplinar e no olhar de dimensões geralmente pouco focadas nos estudos sobre o turismo rural, como a avaliação da experiência dos visitantes, englobando não só o seu perfil socioeconómico, como as motivações, os comportamentos, as perceções da experiência e do destino e os aspetos que deveriam ser melhorados nas aldeias visitadas.

A quinta e última parte, a que corresponde o capítulo 10, apresenta as conclusões e implicações do estudo. Menciona, nomeadamente, que os dados recolhidos junto dos três grupos de inquiridos/entrevistados evidenciam uma perceção bastante positiva da experiência turística vivida nas três aldeias em análise do Norte e Centro de Portugal, e que as comunidades apresentam uma atitude muito favorável ao turismo e aos turistas. Por outro lado, destaca a insuficiência da atuação das redes e o impacto relativamente modesto do turismo na dinâmica económica das comunidades, deixando como desafio a necessidade de “reinventar” o modelo de turismo rural, numa lógica de desenvolvimento turístico sustentável “que tenha em atenção o contributo das várias atividades e domínios de atuação, que integrem os recursos endógenos mais apelativos e distintos das aldeias e das áreas envolventes, e que envolvam efetivamente os stakeholders do destino, articulados em rede”.

Neste mesmo capítulo se deixa um amplo conjunto de propostas para melhorar a experiência cocriada nas aldeias analisadas, em diferentes vertentes: valorização e dinamização dos recursos endógenos; desenho de oportunidades para experiências; e redes e governança. O livro não termina sem deixar um palavra quanto aos riscos e limites do turismo em áreas rurais, nomeadamente quanto à “adulteração de significados e valores” e a outros impactes negativos que um turismo desregrado pode ter nas atrações do destino e na própria “experiência turística procurada”.

Em síntese, estamos na presença de um sólido de trabalho de pesquisa, merecedor de leitura atenta, não só por parte de investigadores e agentes ligados à oferta e planeamento turístico, mas também por todos os que se interessam pela construção de alternativas para o desenvolvimento sustentável de áreas rurais, em Portugal como noutros países, dentro e fora da Europa.

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