

Qualidade em Turismo na Perspetiva dos Decisores Públicos Locais Portugueses: O Caso da Região Centro de Portugal

Quality in Tourism From The Perspective of Local Portuguese Public Decision-Makers: A Case Study of Portugal's *Centro* Region

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Abstract/ Resumo

In Portugal tourism has developed greatly in recent years, as a result of the investment made in the: (i) qualification of human resources; (ii) specialization of supply; (iii) modernization of tourism management processes; (iv) marketing development; (v) and investment in infrastructure and other services and products complementary to the tourism sector. This study aims to identify Portuguese municipalities' perception of what contributes to the quality of tourism. To this end, a quantitative approach was used, with a questionnaire being distributed to municipalities (125 participated in the study, with a total of 134 valid answers). The results revealed that

Em Portugal o turismo tem-se desenvolvido muito nos últimos anos, fruto do investimento que se tem feito na: (i) qualificação dos recursos humanos; (ii) especialização da oferta; (iii) modernização dos processos de gestão das empresas turísticas; (iv) desenvolvimento do marketing; (v) e, no investimento em infraestruturas e outros serviços e produtos complementares à ação turística. Os diversos estudos realizados pelas autoras sobre a perceção dos municípios portugueses (participaram 125 com o total de 134 respostas válidas) sobre o que contribui para a qualidade em turismo, revelou que há um discurso a uma 'só voz' quanto à necessidade de diferenciação

there is a ‘single voice’ discourse regarding the need to differentiate products, develop destinations emphasizing their identity, strengthen networks and differentiate tourism options according to their location.

Keywords: Strategy, destinations, quality, tourism system, regions.

JEL Codes: Z32; R11

1. INTRODUCTION

Portugal has witnessed an exponential growth in tourism in recent years. At the same time, investment has been made in high-quality services and products, which has contributed to the country’s competitive advantage. Improvements in the educational supply at various levels, the construction of infrastructure, the provision of support for research, product diversification, and increased economic activity, both specific and complementary to the tourism sector, have also been observed. Despite the need to keep up the work in various areas in order to consolidate Portugal as an established tourism destination, it is already possible to identify the results of the actions taken in recent years, namely:

a) Portugal has obtained several tourism awards, namely the title of ‘best destination in the world’ in 2017, 2018 and 2019 (Turismo de Portugal, 2018);

b) the growing socioeconomic relevance of tourism, being one of the main export activities, representing about 18% of the country’s global exports (Turismo de Portugal, 2017) and contributing to 13.7% of GDP (Instituto Nacional de Estatística, 2018) in 2017;

c) at the international level, Portugal was ranked the 14th most competitive destination in the world (FEM, 2017);

d) according to the UNWTO (2018), in 2017, it ranked 21st in the world in terms of tourism receipts and 17th in terms of arrivals, representing 3% of the world’s international tourism.

These are encouraging results and a sign that the path taken so far is based on a ‘winning’ strategy. Therefore, this paper aims to understand what public entities responsible for the development of Portuguese tourism regions think about what quality in tourism is and what it should be at the local level. It also analyzes whether Portuguese municipalities identify

de produtos, de desenvolver os destinos salientando a sua identidade, de trabalhar em rede e de diferenciar as opções turísticas nas diversas regiões.

Palavras-chave: Estratégia, destinos, qualidade, sistema turístico, regiões.

Código JEL: Z32; R11

themselves with some priority lines defined in the Tourism Strategy 2027 (Turismo de Portugal, 2017a), jointly proposed by the Ministry of Economy and Tourism of Portugal, such as: (i) valuing the territory through structuring of the tourism supply; (ii) boosting the economy by attracting investment, increasing knowledge, innovation and entrepreneurship; (iii) enhancing the qualification and training of human resources, attracting the most specialized workers by investing in the improvement of the sector’s working conditions; (iv) involving stakeholders, and society in general, in tourism development supported by networking; and (v) promoting Portugal in international markets, reinforcing investment in tourism companies, bringing public administration closer to the sector and using new technologies.

Therefore, knowing the perception of Portuguese entities with different levels of responsibilities and impacts on the development of tourism about the concept of quality in their local destinations constitutes a challenge to which we seek to respond (Hall, 2000; Pearce, 2013; Saraniemi & Kylänen, 2011). To this end, a quantitative approach was used, with a questionnaire being distributed to all Portuguese municipalities (125 participated in the study, with a total of 134 valid answers). The results highlight the necessary terms for quality maintenance in Portuguese destinations and the attributes of municipalities as local Destination Management Organizations (DMOs), their role in the relationship with other stakeholders and the limits they recognize to their action.

The paper is organized as follows: first, the literature on quality in tourism is reviewed, namely concerning destination development and competitiveness, following which the strategy for tourism in different Portuguese regions is addressed. Subsequently, the methodology used for the empirical study is described in more detail. Finally, the research findings are

reported and discussed, and their implications for further research are highlighted.

2. CONCEPTUAL FRAMEWORK

This article explores the issue of quality in tourism. A holistic approach to tourism is what best fits the study of quality factors of complex and multifaceted systems, as is the case of tourism regions. With regard to tourism destinations, it is also considered that the articulation between regional policies, the exploitation and application of knowledge, the link between social and organizational factors, innovation and endogenous resources are reflected in the organization of supply, in the sense of quality (Makkonen & Rohde, 2016). For Haugland, Ness, Grønseth and Aarstad (2011: 269), “destinations are complex co-producing networks, and destination development needs to take into account the challenges of developing strategies involving a large number of companies and other actors such as, for example, local and regional authorities. [...] Second, destination development is a multilevel phenomenon as it requires attention to issues at the level of the individual actor, the level of the destination (inter-firm or

inter-actor), and the level of a larger geographic or regional area (inter-destination)”.

The European Union has played a very important role in promoting cooperation and integration of regions and countries, by stimulating regional tourism development, launching programmes to support economic growth, cultural development and infrastructure, among others (Nilsson, Eskilsson & Ek, 2010). This was a strategy to improve the attractiveness of destinations, linking competitiveness to product innovation and quality of service, and these to the identity of the destination (Badulescu, Hoffman, Badulescu & Simut, 2016). Destination competitiveness is no longer triggered or consolidated by price alone, being achieved mainly by the region’s organizational and relational capacity, which guarantees active stakeholder participation. The responsibility of tourism actors lies in the valorisation and promotion of endogenous, specific and non-transferable resources.

The analysis of previous studies on the relationship between quality and tourism destinations shows this to be associated with the themes of competitiveness, innovation, development, products, policies, planning and governance, among others (see Table 1).

Table 1. Relationship between quality of destinations and other research issues

Research issue	Publications
Competitiveness	Blain, Levy & Ritchie(2005); Dwyer & Kim (2003); Gretzel, Hwang & Fesenmaier(2012); Pearce & Shänzel (2013); Sheehan & Ritchie (2005); Wang (2011&
Cooperation	Badulescu et al., (2016); Vodeb & Rudež (2016)
DMO	Baena-Graciá et al. (2009); Blain et al. (2005); Bramwell & Lane (2012); Gretzel et al. (2006); Hristov & Zehrer (2015); Spyriadis et al. (2013); Volgger & Pechlaner (2014)
Development	Clavé & Wilson (2017); Makkonen & Weidenfeld (2016); Więckowski & Cerić (2016)
Governance	Blasco, Guia & Prats(2014); Farmaki (2015); Scuttari, Volgger & Pechlaner, (2016); Volgger & Pechlaner (2015)
Innovation	Booyens (2016); Booyens & Rogerson (2015); Booyens & Rogerson (2016); Makkonen & Rohde (2016); Weidenfeld (2013)
Marketing	De Noni, Orsi & Zanderighi(2014); Sertakova et al., (2016)
Networks	Escach & Vaudor (2014); Sanz-Ibáñez & Clavé (2014, 2016)
Planning	Blasco et al., (2014); Brouder & Ioannides (2014); Makkonen & Williams (2016); Rovira (2016); Soares et al., (2015)
Policies	Bernabé & Hernandez (2016); Bohlin, Brandt & Elbe (2016); Nilsson et al., (2010); Szytniewski, Spierings & van der Velde(2017); Timothy et al., (2016)
Products	Ferdinand & Williams (2013); Getz & Page (2016); Sakharchuk, Kharitonova, Krivosheeva & Ilkevich (2013); Sarasa (2015); Vermeulen (2015)
Quality	Bernabé & Hernández (2016); Blasco (2014); De Noni, Orsi & Zanderighi (2014); Sakharchuk et al., (2013); Sarasa (2015); Weidenfeld (2013); Więckowski & Cerić (2016)

Source: Own elaboration

The specialized literature associates territory, products and governance models with structuring factors of tourism destinations. DMOs have an integrating function of policy and strategy development, resource preservation, increasing innovation, management of

stakeholder networks, promotion and knowledge transfer. They consider it is this integrated vision of quality that influences destinations’ competitive capacity and economic development, mainly at the regional and local level. The previous analysis also revealed other

types of information, which explain the role of DMOs in the quality and competitiveness of destinations. This assessment guides a reflection centred on the relationship between the

constructs of DMOs / Quality of tourism destinations and DMOs / Competitiveness of tourism destinations, which is systematized in Tables 2 and 3.

Table 2. Relationship between DMOs and quality of tourism destinations

Issues	DMOs' functions	Authors
Quality	Integrated resource management	Blain et al. (2005); Dwyer & Kim (2003); Gretzel et al. (2012); Pearce & Shänzel (2013); Sheehan & Ritchie (2005); Wang (2011)
	Product development and innovation	
	Marketing strategy	
	Service and product quality	
	Outcome Evaluation	
	Human resources skills	
	Technology (<i>web-marketing & e-commerce</i>)	
	Modernization of organizations' internal structures and processes	
Commitment / Stakeholders	Competitive and business opportunity monitoring	Bornhorst, Ritchie & Sheehan (2010); Park & Jamieson (2009); Soteriou & Coccossis (2010); Stevenson, Airey & Miller(2008); Zach (2012)
	Coordinated planning of stakeholder interests	
	Resource sharing negotiation	
	Community action plans	
	Creative and innovative partnerships	
	Feeling of belonging and affective bond with the brand	
	Inter-organizational Partnerships	
Leadership	Organizational skills development	Beritelli & Laesser (2014); Hristov & Zehrer (2015); Spyriadis et al. (2013); Volgger & Pechlaner (2014)
	Knowledge Sharing	
	Organization of cooperation	
	Participatory and distributed leadership	
	Stakeholder involvement in destination policies and decisions	
Assessment	Defining the boundaries of responsibility and decision-making autonomy	Baena-Graciá et al. (2009); Blain et al. (2005); Bramwell & Lane (2012); Gretzel et al. (2006); Hristov & Zehrer (2015); Spyriadis et al. (2013); Volgger & Pechlaner (2014)
	Strategy and decision evaluation	
	Implementation of standards, designed structures and processes from the bottom up	
	Tangible and intangible results	
	Benchmarking	
	Tourism activity	
	The effectiveness of DMOs in funding management, resources and territorial framework	
	Organizational performance	
	Tangible and intangible impacts	

Source: Own elaboration

Table 2 shows that the quality of tourism destinations implies a leadership model able to engage people in the target project, to evaluate results and to help organizations to modernize and improve their work processes. These are usually attributes of destination governance models, with implications for territories' development and economic capacity. This is one of the functions of DMOs in promoting the quality of tourism destinations, ie, stimulate the economy, support stakeholders in business management opportunities and create conditions for regions' development.

Table 3 highlights the issues of economic development, product innovation, qualification of human resources, modernization of organizations and marketing in the competitiveness of

tourism destinations. In the analysis of destinations, quality and competitiveness address similar issues. There is a dimension of integrated territorial development, which must be reflected in the quality of products and in the way resources are managed and differentiated, as well as in supporting companies' action. Stimulating the economy presupposes a leveraged strategy in people, innovation and knowledge. It appears that it is up to DMOs to articulate the different components of this system, ensuring that the supply of differentiated products reflects territories' culture and identity. This identity must support the marketing strategy in promoting a destination brand, around which innovative and competitive products are created.

Table 3. Relationship between DMOs and competitiveness of tourism destinations

Issues	DMOs' functions	Authors
Competitiveness	Integrated resource management	Armenski, Gomezelj, Djurdjev, Curcic & Dragin (2012); Blain, Levy & Ritchie (2005); Dwyer, Cvelbar, Edwards & Mihalic (2012); Dwyer & Kim (2003); Estevão & Ferreira (2015); Pearce & Shänzel (2013); Sheehan & Ritchie (2005); Wang (2011)
	Product development and innovation	
	Marketing strategy	
	Service and product innovation	
	Outcome evaluation	
	Human resources skills	
	Business opportunity management	
Resources	Human and organizational skills development	Bornhorst et al.(2010); Costa (2014); Ferreira et al. (2011); Haugland et al. (2011); Pearce & Schänzel (2013)
	Endogenous resources	
	Resources and opportunities	
	Natural and cultural resources	
	Tourism resources	
	Technological resources	
	Resource Study	
Opportunities	Accessibilities and infrastructure	Dwyer et al. (2012); Estevão & Ferreira (2015); Fernandes & Eusébio (2014); Gretzel et al. (2006); Martínez-García et al (2013)
	Internal and External environment	
	Markets / business	
	Investment / Financing	
	Policies	
Marketing	National and international partnerships	Bornhorst et al. (2010) Haugland et al. (2011); Polese & Minguzzi (2010); Zach (2012)
	Access to knowledge and information	
	Destination marketing management	
	Destination promotion	
	Affective ties with the brand	
	Interactive marketing networks	
	Marketing Innovation	
Innovation	Marketing plan emerges from the relationship between environment and stakeholders	Assaf & Dwyer (2013); Daszkiewicz (2014); Della-Corte (2013); Fernandes & Eusébio (2014); Neto & Francisco (2011); Prats, Guia & Molina(2008)
	Collaborative Marketing	
	Marketing Investment	
	Tourism destinations depend on innovation	
	Destinations are places of tourism innovation	
	Competitiveness of destinations is based on an innovation strategy	
	Destination assessment leads to innovation	
Innovation strategy		
Innovation Skills Diagnosis		
Innovative product development		
Technological innovation and quality of services		

Source: Own elaboration

Destinations no longer compete only with their neighbours, but with others that are often situated far from their borders. Therefore, the market is global. For this reason, the local economic and social vitality, i.e. territorial competitiveness, has the challenge of marketing products and services in the international market, making them reach the consumer's door. There is an economic dimension associated with products' competitiveness. These must be innovative, have quality and be created through a network to ensure they are competitive enough to be considered business opportunities. There is also the territory within which the destination project must be born.

These aspects motivated the desire to know what Portuguese DMOs think about these

issues, in different regions of the country. Regional tourism structures, together with Municipal Councils, have a set of responsibilities in the development of tourism, at the regional and local level, namely approval and licensing of enterprises, construction of infrastructure, attracting investment, support for entrepreneurship and promotion, among others. Therefore, those responsible for tourism in Municipal Councils were consulted, through a self-administered questionnaire, which reflects the dimensions standing out in the literature review: development, economy, human resources, products and marketing. In this first phase, the results were treated at the regional level, and it is expected to replicate the methodology presented here at the local level in future

investigations, detailing the data related to municipalities. Previous publications by the authors focused on what local stakeholders in tourism in Portugal think about what is meant by quality in tourism. Based on the tourism quality factors validated in this model at the national level, the study presented here seeks to highlight the differences and similarities in the way these factors are perceived in the different regions of Portugal.

The study is based on the premise that territories have a natural and cultural identity that facilitates the organization of tourism destinations in three main areas:

a) tourist products that are inspired by the uniqueness of natural and cultural resources identified at the local level reflect their quality and differentiation (Bernabé & Hernández, 2016; Ferdinand & Williams, 2013; Getz & Page, 2016; Rovira, 2016; Sakharchuk, Kharitonova, Krivosheeva, & Ilkevich, 2013; Sarasa, 2015; Szytniewski, Spierings & van der Velde, 2017; Vermeulen, 2015);

b) the dynamics of the local economic activity observed in the characteristics of the productive fabric, in business entrepreneurship capacity and in strategic management models reflect regions' competitiveness (Assaf & Dwyer, 2013; Bannò, Piscitello & Varum, 2015; Bohlin, Brandt & Elbe, 2016; Booyens, 2016; Booyens & Rogerson, 2015; Dwyer, Cvelbar, Edwards & Mihalic, 2012; Dwyer, Cvelbar, Mihalic & Koman, 2014; Estevão & Ferreira, 2015; Pike & Page, 2014; Ritchie & Crouch, 2010; Vodeb & Rudež, 2016; Więckowski & Cerić, 2016);

c) stakeholder network governance that links the territory to the economy guarantees the presentation of identity and endogenous innovation, facilitating the emergence of regional innovation systems (Blasco, Guia & Prats, 2014; Farmaki, 2015; Fernandes & Eusébio, 2014; Hall & Campos, 2014; Moulaert, 2005; Moulaert & Sekia, 2003; Scuttari, Volgger & Pechlaner, 2016; Stevic & Breda, 2014; Trentin, 2016; Volgger & Pechlaner, 2015).

Reconciling these three aspects (quality, economic activity planning, and innovation of the product) stresses the difficulty in managing and stimulating destinations' systemic structure, in terms of their competitive capacity. These need to adopt strategies to attract customers worldwide, providing the tourism service at the local level. To this end, an active and integrated role among suppliers, companies, local

people and governmental structures is fundamental (Erkus-Öztürk, 2009), committed to the quality of supply. This is because regions influence countries' economic development in general and the development of tourism destinations in particular (Bohlin et al., 2016). Recognizing regional similarities and disparities fosters the linkage between politics and the economy, and them with knowledge and innovation. It is this integrated and systemic vision of tourism that ensures the quality of destinations, because it associates economic development with knowledge, innovation with quality, and identity with differentiation.

3. REGIONAL TOURISM STRATEGY IN PORTUGAL

Portugal has seven regions (Nomenclature of territorial units for statistical purposes - NUTS II), whose characteristics and degree of autonomy are different. The two regions with political, administrative and financial autonomy are the archipelagos of Madeira and the Azores. All other regions are located in mainland Portugal and their action is very dependent on central government. For historical, social, geographical and political reasons, there are many differences between these territories, reflecting different needs, problems, potentialities and levels of tourism development. Although regional tourism strategies are based on the national strategic plan, they are adjusted to the situation of each region.

This strategic plan, called Tourism Strategy 2027 (Turismo de Portugal, 2017a), is defined by Turismo de Portugal, under the supervision of the Ministry of Economy, and links national guidelines for tourism, being the strategic reference for the sector in the next decade. The regional structures of this organization - Regional Tourism Entities (RTE) - are responsible for regional tourism development, in line with these guidelines. In each of the regions, these entities work very closely with municipalities and other stakeholders, encouraging local initiatives and at the same time ensuring that they fall within the strategic, regional and national guidelines defined for the sector. Leading the tourism of the future focused on people is at the heart of this strategy, which guides: (i) a vision of affirming tourism as a hub for economic, social and environmental development throughout the territory; (ii) the ambition position Portugal as one of the most competitive and sustainable

tourist destinations in the world; (iii) the definition of priorities systematized in five strategic axes, namely, valuing the territory, boosting the economy, boosting knowledge, generating networks and connectivity, designing Portugal and committing to economic, social and environmental sustainability goals. These strategic axes coincide with the theoretical perspective presented here, which associates quality with development, economy, human resources, products and marketing. The perception that quality results from a systemic perspective affecting different domains simultaneously led to establishing the following targets:

a) economic sustainability targets: increase tourist demand throughout the territory and grow in value;

b) social sustainability targets: reduce seasonality, increase people's qualifications and guarantee residents' satisfaction;

c) environmental sustainability targets: to support companies in adopting efficient measures for the use of energy and water, as well as developing waste management systems.

These strategic axes, and the proposed goals, affect the tourism strategy defined in each region of the country, as well as the products around which tourism is organized, at this level. Depending on the endogenous resources, culture and identity of the territory, associated with the region's economic vitality and stage of social and environmental development, tourism products and business development is proposed, and these must fit into the strategic assets defined at the national level: people; climate and light; history and culture; sea and nature; water; gastronomy and wines; artistic-cultural, sporting and business events; welfare; living in Portugal. These strategic options were defined based on the indicators systematized in Table 4.

Table 4. Tourism indicators by region

Region Indicators	<i>Norte</i>	<i>Centro</i>	<i>Lisbon</i>	<i>Alentejo</i>	<i>Algarve</i>	<i>Azores</i>	<i>Madeira</i>
Guests	5,3 M	3,9 M	7,5 M	1,5 M	4,7 M	718 mil	1,6 M
Foreign guests	50,9%	41,0%	73,3%	35,4%	72,3%	50,6%	80,6%
Share compared to the national total	20,9%	15,4%	29,9%	5,8%	18,7%	3,1%	6,4%
Variation 2017/18	+8,0%	+2,4%	+5,7%	+7,4%	+4,7%	+16,6%	-0,7%
Nights	9,8 M	6,8 M	17,5 M	2,7 M	20,4 M	2,1 M	8,3 M
Foreign overnight stays	58,7%	44,3%	78,7%	36,2%	76,3%	57,9%	88,8%
Share compared to the national total	14,5%	10,0%	25,9%	4,0%	30,2%	3,1%	12,3%
Variation 2017/18	+8,5%	+0,2%	+4,9%	+7,6%	+1,2%	+14,1%	-0,2%
Average stay	1,9	1,7	2,3	1,8	4,3	2,9	5,2
Global income	560 M€	333 M€	1 267 M€	2,7 M	1.145 M€	105 M€	427 M€
Room income	431 M€	235 M€	1.005 M€	110 M€	852 M€	81 M€	279 M€
Bed occupancy rates	51,8%	37,6%	59,7%	40,1%	49,2%	48,4%	67,4%
Room occupancy rates	64,1%	45,0%	75,6%	52,2%	63,8%	59,8%	74,0%
RevPar	40,7€	24,4€	74,2€	30,2€	52,7€	35,6€	41,9€
Seasonality	34,5%	37,7%	31,3%	40,8%	43,3%	40,8%	30,9%
Establishments	1.438	1.175	908	625	817	363	1.542
Rooms	30.512	28.150	37.889	10.742	50.983	6.753	19.406
Beds	30.512	60.646	84.184	23.852	131.243	14.902	41.824

Source: Turismo de Portugal (2019)

The 'Tourism Strategy 2027' presents a management and monitoring model composed of: (i) managing entity - Turismo de Portugal I.P. ; (ii) Regional Tourism Entities and strategic tourism laboratories, both regional and thematic, promoting the continuous involvement of actors; and (iii) holding annual, national and regional forums, to transfer knowledge and consolidate stakeholder networks. Table 5 presents a summary of the main strategies and products chosen in each of the Portuguese tourist regions.

These regions seek to reconcile modernity with their vast and ancient cultural and natural heritage, offering an environment capable of meeting different motivations and the expectations of diverse market groups. The main problems experienced are: seasonality of tourism flows, desertification of the hinterland, poor qualification of human resources, difficulty in accessibility, and the tendency for tourism to concentrate on the coastal area. What stands out is the importance of investing in tourism's

Table 5. Tourism strategy by region

Regions	Strategy	Guidelines	Products
<i>Norte</i>	Develop the attractiveness of the destination	Portugal's 'Porto and North' destination should provide visitors with a holistic experience in the region	Cultural and landscape touring
	Consolidate and harmonize the quality of the supply		Nature tourism
	Invest in promotion and marketing	The region's residents are a fundamental part of the destination's tourist experience.	Gastronomy and wine
	Develop partnerships with stakeholders		Wellness
	Improve product communication and distribution channels	The development of tourism must contribute to the preservation and improvement of the natural, economic and social environment of the region.	Religious tourism
		City breaks	
<i>Centro</i>	Reinforcement of sectoral and territorial coordination	Sustainability and territorial cohesion	Cultural tourism / Heritage
	Sustainable promotion operationalized in the efficient use of resources	Development and qualification of tourism products and agents	Nature tourism / Sea
	Consolidation of networks and collaborative platforms facilitating synergies aimed at the economic valuation of tourism	Entrepreneurship	Lifestyle migration
	Focus on marketing, professionalization, modernization and rationalization	Innovation and differentiation	Well-being
	Internationalization, transfer of results from the scientific system to the economic fabric	Research and training	Scientific and technological, and residential tourism
Lisbon Metropolitan Area	Development of new centralities and multi-centrality experiences	Deepen the relationship between Lisbon and the Region	Cultural tourism / Heritage
	Enhance the diversity of tourism attractions in the Lisbon Region	Promotion of diversity, modernity and identity	Nightlife
	Upgrade the urban area	Value the existing assets in the Lisbon Region	Shopping
	Upgrade the offer		Cruises
	Implement the governance model of the new centrality	Strengthen the international brand	Business and events
			Nautical Tourism
			Surf / Golf
Gastronomy			
		Equestrian tourism	
<i>Alentejo</i>	Affirm the Tourism Cluster	Certified tourism destination throughout the value chain	Nature Tourism
	Work for a regional inter-sectoral vision	Have international recognition as a goal	Sun and Sea
	Managing prospects by strengthening skills	Differentiation of tourism experiences based on the identity of the territory	Nautical Tourism
	Institutionalize supply networks in the Territory	Stimulate the governance of the destination	Touring / Cultural,
	Upgrade and create new tourism products		Gastronomy and Wines
	Reinforce digital promotion and marketing		Hunting Tourism
Health and Wellness			
<i>Algarve</i>	Balance the demand and supply ratio in the Algarve region	Environmental sustainability	Sun and Sea/ Golf
	Qualification and diversification of tourism	Urban structuring	Business Tourism
	Safeguarding and enhancing the historical-archaeological cultural heritage	Territorial rebalancing	Gastronomy and wines
	Structuring of collective equipment networks	Qualified human resources	Residential Tourism
	Structuring of transport networks and logistics	Retain skilled human resources	Touring
	Diversify markets and publics		Health and Wellness

	Online product distribution and promotion		Nature Tourism
			Nautical Tourism
Madeira	Improve the performance of the various economic agents, both public and private	Balancing tourism development throughout the archipelago	Cultural and religious touring
	Preserve and enhance the region's natural, historical and cultural heritage	Promote confidence in the history and future of Madeira	Nature Tourism
	Offering innovative, diverse and authentic experiences of tourist solutions	Stimulate cooperation among the various stakeholders	Nautical Tourism
	Promoting tailor-made trips	Increase the ambition required to anticipate tourism trends	Health and Wellness
	Increase tourists' level of satisfaction at all times of the trip		Sun and Sea
Gastronomy and wines			
		Event / Golf	
		Residential Tourism	
Azores	Promote ongoing cooperation between public and private stakeholders	Position the Azores as an exclusive destination of exuberant nature / environmental preservation	Nature Tourism
	Promote complementarity of supply between islands and products	Tourism qualification and sustainable development	Nautical Tourism
	Qualify supply, infrastructure, and human resources and raise residents' awareness about hospitality	Tourism development as a tool to boost the regional economy in all islands	Cultural and Landscape touring
	Improve the destination's competitiveness and increase tourist flows		Health and Wellness
	Invest in marketing, digital marketing and e-commerce		Sun an Sea
	Improve distribution channels, directing them to the Azores' strategic markets		Golf
		Business Tourism	

Source: Based on ACIF (2015), Berger (2014), IPDT (2015, 2016), Machado (2016), NEOTURIS (2013) and Turismo de Portugal (2014, 2017a).

authenticity and quality. Therefore, highlighted as priority strategies are the qualification of human resources, networking between local authorities and the private sector and balancing tourism development throughout the territory. Some of these aspects are not felt in cities located in these regions, but even in the Lisbon Metropolitan Area, there are micro-destinations where these problems are observed. To overcome them, it is assumed that internationalization and the transfer of results from the scientific system to the economic fabric are crucial. This process should be supported by networks, partnerships and all other forms of collaboration between stakeholders. A set of strategies is based on the following values: modernity, authenticity, diversity and an acceptable tourism density. The big challenge is to maintain this competitive capacity at the international level, for which qualification and innovation are fundamental. That is why it is fundamental to lead municipalities to integrate and apply this vision for tourism, carrying out the sustainable plan-

ning of resources, evaluating the quality of the results and adjusting their action to the stage of the destination life cycle (Gretzel, Hwang & Fesenmaier, 2012; Park & Jamieson, 2009; Pyo, 2010). This implies implementing a model of network governance with local municipalities, as well as maintaining the high level of attractiveness already achieved, ensuring a high quality of life that also attracts specialized human resources and entrepreneurs (De Noni, Orsi & Zanderighi, 2014).

4. METHOD

4.1 Sample

The sample comprises 134 participants from 125 Portuguese municipalities, from the north to the south of the country and islands, corresponding to 40.6% of the total of 308 Portuguese municipalities. The sample's characteristics are shown in Table 6. Most respondents were aged from 35 to 49 years old (65.7%), with

more female (57.5%) than male (42.5%) participants. Almost 60% occupy the position of Senior Official, more than 80% work in the municipal tourism department, and 56.7% have been working in the municipality for more than 10 years. Most of them hold a permanent position

(63.4%) and have a university degree (50.0%), followed by a master (20.1%) and a postgraduate degree (21.6%). The majority of participants came from the *Centro*, *Norte*, and *Alentejo* regions.

Table 6. Sample's characteristics [134 participants from 125 Portuguese municipalities]

Sample	n	%
Sex:		
Male	57	42.5
Female	77	57.5
Age:		
Between 18 and 24 years	1	0.7
Between 25 and 34 years	24	17.9
Between 35 and 49 years	88	65.7
Between 50 and 64 years	20	14.9
Over 64 years	1	0.7
Period of employment in the municipality:		
Up to 1 year	4	3.0
From 1 to 5 years	22	16.4
From 5 to 10 years	32	23.9
More than 10 years	76	56.7
Positions in the municipality:		
Employee	109	68.6
Political position	25	15.7
Mayor	3	1.89
Alderman	9	5.66
Vice President	4	2.52
Other	9	5.66
Hiring regime of workers in the municipality:		
Temporary employment contract	4	3.0
Permanent employment contract	85	63.4
Individual work contract	7	5.2
Consultant	6	4.5
Other	7	5.2
Missing-values	25	18.7
Professional category:		
Director of services and equivalent positions	1	0.8
Head of Division	14	10.5
Sub director, Director General and equivalent positions	1	0.8
Senior Employee	80	59.7
Other	13	9.7
Missing-values	25	18.7
Qualifications:		
Basic education (9th year)	1	0.8
Secondary Education (12th year)	5	3.7
Diploma	4	3.0
Degree	67	50.0
Postgraduate studies	29	21.6
Master	27	20.2
PhD	1	0.8
Regions in Portugal (n° of participants inquired)		
<i>Norte</i>	30	22.4
<i>Centro</i>	50	37.3
Lisbon Metropolitan Area	5	3.7
Alentejo	24	17.9
Algarve	8	6.0
Autonomous Region of Madeira	4	3.0
Autonomous Region of Azores	11	8.2
Missing-values	2	1.5

Source: Based on SPSS statistical program (version 22.0) outputs

When we compare the number of participants with the number of municipalities by region, the results are slightly different. The

majority of participants came from the Azores, Centre of Portugal, Algarve and Alentejo (Table 7).

Table 7. Percentage of regions' participation

Regions	Municipalities by region	Participants inquired by region	%
Regions in Portugal			
Autonomous Region of Azores	19	11	57.9
<i>Centro</i>	100	50	50.0
Algarve	16	8	50.0
Alentejo	58	24	41.4
Autonomous Region of Madeira	11	4	36.3
<i>Norte</i>	86	30	34.8
Lisbon Metropolitan Area	18	5	27.7
Missing values		2	1.5
TOTAL	308	134	43.5

Source: Adapted from Portuguese National Association of Municipalities

4.2 Instruments

Five subscales of tourism quality in Portugal were developed by the authors, and have been previously validated with a sample of the Portuguese population: 'development' (three dimensions: 'planning strategy', 'governance', and 'innovation policy'), 'economy' (three dimensions: 'development strategy', 'economic factors of demand', and 'financial incentives'), 'human resources' (five dimensions: 'work skills', 'employment policy', 'business strategy', 'training', and 'labour market'), 'product' (three dimensions: 'services', 'resources and attractions', and 'accessibilities and infrastructure'), and 'marketing' (two dimensions: 'image and promotion', and 'product differentiation'). Each subscale is composed of several items measured on a 5-point Likert scale from 1 = 'I strongly disagree' to 5 = 'I totally agree'.

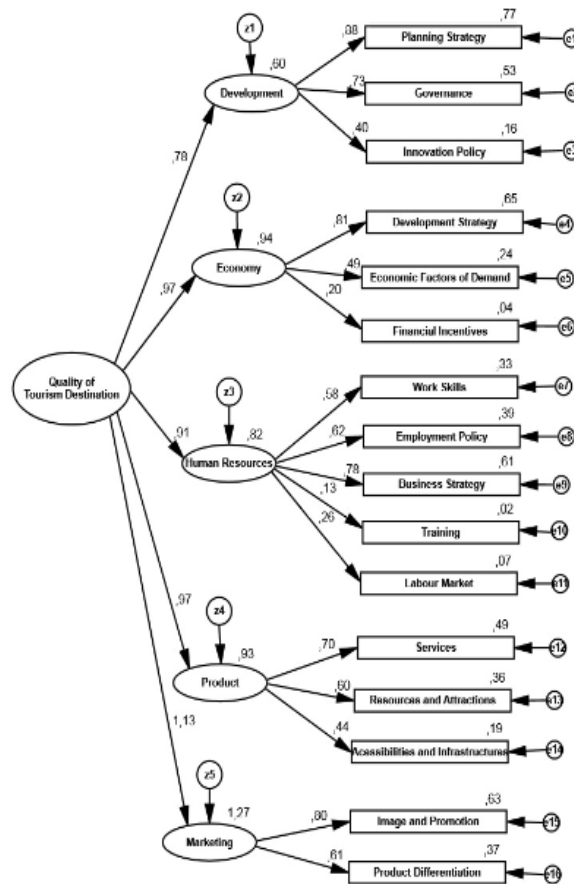
The five subscales were previously developed and validated (Mira, Moura, & Mónico, 2017, 2018; Mira, Mónico, Moura, & Breda, 2017; Mira, Moura, Mónico, & Breda, 2018; Moura, Mónico, & Mira, 2019), with the underlying dimensions of the *Quality of Tourism Destinations* construct. According to the validation of each subscale, the *Quality of Tourism Destinations* construct was operationalized through the *Development*, *Economy*, *Human Resources*, *Product* and *Marketing* subscales. In each of these subscales specific factors emerged, reflec-

ting valid and reliable dimensions of each component of *Quality of Tourism Destinations* (see Figure 1). Confirmatory Factor Analysis (CFA) was performed for the model (Figure 1), in order to test its goodness of fit. We obtained good fit indices considering CMIN/DF=1.60, NFI=.811, SRMR=.0614, and CFI=.917, and an acceptable fit considering RMSEA=.067. The Cronbach alphas of the global model, considering the factors of the five subscales, showed good internal consistency, $\alpha = .860$.

4.3 Procedures

An online version of the questionnaire was built using Google Forms and was sent by e-mail to all Portuguese municipalities. Control of the responses was carried out monthly through the 'Municipality' variable, a reminder being sent to the municipalities that had not yet responded, reinforcing the importance of their participation in the study. The questionnaire had the instruction that it should be filled in by representatives of the municipality with responsibilities in tourism. Information on the objectives of the study, completion instructions, the voluntary and anonymous nature of participation and the guarantee of data confidentiality were also included at the beginning of the questionnaire. Ethical issues were, thus, taken into account when collecting data, namely respecting participants' anonymity and data confidentiality, and measures to avoid bias.

Figure 1. CFA for ‘Tourism Destination Quality Model’ measure: Standardized regression weights and squared multiple correlations



Source: Output from AMOS statistical program (version 22.0)

4.4 Statistical analysis

All the statistical analyses were performed using the SPSS statistical program and AMOS version 22.0 for Windows (IBM Corp. Released 2013). Adopting empirical variables as abstract constructs aimed to contrast data and theory of *Tourism Destination Quality*, and so confirmatory factor analysis was performed (Fornell & Bookstein, 1982), using AMOS software (estimation method by maximum likelihood). Goodness of fit was analysed by the fit indices NFI, SRMR, TLI, CFI, and

RMSEA (Schumacker & Lomax, 2016). The normality of the dimensions' scores per NUTS II was evaluated using the coefficients of Skewness and Kurtosis (scores lower than 1 were obtained), and also the Shapiro-Wilk tests (a significance level $p \geq .05$ was obtained in all NUTS II), enabling the use of parametric tests. Outliers were analysed using the Mahalanobis squared distance (Tabachnick & Fidell, 2013). Internal

consistency was calculated through the Cronbach alpha.

After descriptive statistics (means M and standard-deviations SD), Pearson correlations (r) were performed; the effect size of the associations between variables was classified according to Cohen (1988): null ($r < .10$), low ($.10 \leq r < .30$), moderate ($.30 \leq r < .50$), and high effect size ($r \geq .50$).

5. RESULTS

Table 8 presents the means, standard deviations and inter-correlation matrix between the Quality of Tourism Destination subscales. The 'Product' subscale received the highest score, followed by 'Economy', 'Marketing', and 'Development', and finally, 'Human Resources'. In general, the correlations between all the Tourism Destination subscales were high ($r > .50$).

Regarding the descriptive statistics and inter-correlations by NUTS II (Table 4), some

Table 8. Means, standard-deviations and inter-correlation matrix between Quality of Tourism Destination subscales [N = 134]

	M	SD	α	1(DEV)	2(ECO)	3(HR)	4/(PRO)	5(MARK)	6(GS)
1 Development	3.36	.52	.925		.615***	.533***	.509***	.637***	.813***
2 Economy	3.59	.41	.839		1	.547***	.541***	.695***	.816***
3 Human Resources	3.30	.39	.824			1	.516***	.666***	.776***
4 Product	3.91	.43	.822				1	.751***	.801***
5 Marketing	3.49	.55	.876					1	.916***
6 Global Scale	3.53	.38	.860						1

*** $p < .001$

Source: Output from SPSS statistical program (version 22.0)

differences were found between regions. Considering the 'Development' subscale, the highest mean scores were registered in the Algarve region and in the Lisbon Metropolitan Area, while the lowest scores were found in the Autonomous Region of Madeira and Alentejo. Considering the 'Economy' subscale, higher scores were found in the Autonomous Regions of Azores and Madeira, the lowest score being registered in the Lisbon Metropolitan Area. Concerning the 'Human Resources' dimension, higher scores were found in the Autonomous Regions of Azores and Madeira, and lower scores in Alentejo, Lisbon Metropolitan Area and the Algarve. For the 'Product' dimension, the *Norte* and the Autonomous Region of Madeira stand out with the highest scores, followed by the Algarve (lowest scores found for Alentejo). Finally, considering the 'Marketing' dimension, the *Norte* and the Autonomous Regions of Azores and Madeira received the highest scores, while Alentejo and the Lisbon Metropolitan Area had the lowest scores.

As for the associations between the Quality of Tourism Destination subscales, in general, high effect sizes were found (Table 8). However, differences between NUTS II can be noted (Table 9), as perceived by the participants in this study, in particular considering the Algarve, the Autonomous Regions of Azores and Madeira, and also the Lisbon Metropolitan Area. Despite the small effect size, a negative correlation was found between the 'Economy' and 'Human Resources' subscales; for the Algarve and the Autonomous Region of Azores (but not the Autonomous Region of Madeira), a small effect size correlation between these two subscales was also found, contrasting with the high effect size correlations found in the remaining NUTS II (especially in Alentejo and the Autonomous Region of Madeira). For the Autonomous Region of Azores, a negative and low cor-

relation was found between the 'Economy' and 'Product' subscales. The region with the lowest effect size correlations was the Algarve, contrasting with Alentejo, *Norte*, and *Centro*, with the highest subscale correlations. 'Development' and 'Marketing' received the highest correlations in *Norte* and Alentejo, with weak correlations in the Autonomous Region of Azores; for this region, the 'Economy' dimension has no correlation with 'Marketing' and weak correlations with 'Human Resources' and 'Product', although a strong correlation with 'Development' was found. For the Lisbon Metropolitan Area no correlation was found between 'Development' and 'Human Resources' (also for the Algarve, with a small effect size correlation), contrasting with the remaining NUTS II, where strong correlations were found for Alentejo, *Norte*, *Centro*, and the Autonomous Region of Azores, and a moderate correlation was found for the Autonomous Region of Madeira. In all NUTS II 'Human Resources' and 'Marketing' were highly associated. Also, in all NUTS II, the 'Development' dimension was strongly correlated with 'Marketing' (except for the Autonomous Region of Azores, where a small effect size correlation was found) and with 'Economy' (except for the Autonomous Region of Madeira, with a moderate correlation). Excluding the Algarve (small correlation), strong correlations were found between 'Product' and 'Marketing' in all NUTS II. 'Economy' and 'Product' were highly correlated in the *Norte*, the Lisbon Metropolitan Area, Alentejo, and the Autonomous Region of Madeira, moderately correlated in *Centro* and the Algarve, and negatively and weakly correlated in the Autonomous Region of Azores.

Table 9. Means, standard-deviations and inter-correlation matrix between Quality of Tourism Destination subscales by NUTS II

NUTS II Subscales	M	SD	1 (DEV)	2 (ECO)	3 (HR)	4 (PRO)	5 (MARK)	6 (GS)
<i>Norte [n = 30]</i>								
1 Development	3.41	.67	1	.620***	.672***	.524**	.837***	.869***
2 Economy	3.60	.39		1	.692***	.756***	.828***	.865***
3 Human Resources	3.37	.48			1	.679***	.741***	.859***
4 Product	4.07	.41				1	.781***	.825***
5 Marketing	3.64	.53					1	.960***
6 Global Scale	3.62	.43						1
<i>Centro [n = 50]</i>								
1 Development	3.36	.50	1	.551***	.594***	.529***	.578***	.810***
2 Economy	3.62	.41		1	.494***	.440***	.632***	.760***
3 Human Resources	3.28	.35			1	.646***	.713***	.824***
4 Product	3.88	.41				1	.727***	.810***
5 Marketing	3.48	.48					1	.893***
6 Global Scale	3.52	.35						1
<i>Lisbon Metropolitan Area [n = 5]</i>								
1 Development	3.43	.43	1	.927*	.031	.928*	.763	.909*
2 Economy	3.39	.21		1	-.172	.938*	.763	.884*
3 Human Resources	3.22	.20			1	.099	.450	.285
4 Product	3.87	.69				1	.910*	.974**
5 Marketing	3.28	.71					1	.962**
6 Global Scale	3.44	.40						1
<i>Alentejo [n = 24]</i>								
1 Development	3.32	.50	1	.884***	.741***	.775***	.829***	.953***
2 Economy	3.46	.51		1	.926***	.697***	.826***	.934***
3 Human Resources	3.14	.34			1	.496*	.603**	.775***
4 Product	3.75	.41				1	.768***	.842***
5 Marketing	3.20	.63					1	.926***
6 Global Scale	3.37	.43						1
<i>Algarve [n = 8]</i>								
1 Development	3.44	.47	1	.642	.165	.031	.487	.743*
2 Economy	3.73	.35		1	.146	.366	.099	.682
3 Human Resources	3.25	.38			1	.387	.827*	.705
4 Product	4.03	.27				1	.223	.513
5 Marketing	3.63	.30					1	.767*
6 Global Scale	3.62	.25						1
<i>Autonomous Region of Madeira [n = 4]</i>								
1 Development	2.98	.49	1	.370	.337	.592	.623	.667
2 Economy	3.62	.46		1	.925	.843	.955*	.938
3 Human Resources	3.46	.45			1	.607	.904	.148
4 Product	4.07	.74				1	.866	.910
5 Marketing	3.64	1.04					1	.994*

6 Global Scale	3.55	.57						1
Autonomous Region of Azores [n = 11]								
1 Development	3.40	.39	1	.510	.631*	-.033	.170	.671*
2 Economy	3.69	.28		1	.128	-.135	-.015	.423
3 Human Resources	3.40	.22			1	.310	.595	.771**
4 Product	3.82	.39				1	.822**	.641*
5 Marketing	3.68	.33					1	.796**
6 Global Scale	3.60	.21						1

* $p < .05$ ** $p < .01$ *** $p < .001$

Source: Output from SPSS statistical program (version 22.0)

Table 9 shows that we can group Portuguese regions in three groups, taking into account the average scores and the level of magnitude of the interrelations among the different scales. *Norte*, *Centro* and *Alentejo* regions present high correlations among the different scales of the questionnaire ($r < .50$). It should be highlighted that the magnitude of the inter-correlation between ‘Human Resources’ and ‘Product’ in the *Alentejo* is .496. Because this value is very close to the reference value considered ($r < .50$), it is understood that these three regions show values of magnitude of the inter-correlations between scales that are quite high and with levels of statistical significance of $p < .001$.

The Lisbon Metropolitan Area and the Azores present the most puzzling results, with magnitude values ranging from null to high and negative correlations between scales and items of the different scales. These two regions form a group which will be subject to further analysis in the following section. Finally, it is noted that in the Algarve and Madeira the value of the inter-correlations is moderate or low, both between the ‘Development’, ‘Economy’ and ‘Product’ scales, and between the ‘Human Resources’ scale and the global survey (GS).

6. DISCUSSION

6.1 ‘Tourism Destination Quality Model’

The dimensions, factors and items that compose the ‘Tourism Destination Quality Model’ (see Figure 1) meet some of the strategic lines identified for Portugal (Turismo de Portugal, 2017a).

The dimensions of ‘Development’, ‘Economy’, ‘Human Resources’, ‘Product’ and ‘Marketing’, explain the ‘Quality Tourism Destinations’ concept, and reflect the strategic priorities

set out in ‘Tourism Strategy 2027’, including: valuing the territory through structuring of the tourism supply; (ii) boosting the economy by attracting investment, increasing knowledge, innovation and entrepreneurship; (iii) enhancing the qualification and training of human resources, attracting the most specialized workers by investing in the improvement of the sector’s working conditions; (iv) involving stakeholders, and society in general, in tourism development supported by networking; and (v) promoting Portugal in international markets, reinforcing investment in tourism companies, bringing public administration closer to the sector and using new technologies. This result becomes more understandable when analysing the high inter-item correlation magnitude values ($r > .50$) among the factors of each of the model’s dimensions:

a) ‘Development’ is formed by two factors: ‘planning strategy’ ($r = .100$) and ‘governance’ ($r = .79$).

b) ‘Economy’ is formed by two factors: ‘development strategy’ ($r = .100$) and ‘economic factors of demand’.

c) ‘Human Resources’ is formed by three factors: ‘work skills’ ($r = .100$), ‘employment policy’ ($r = 1.11$) and ‘business strategy’ ($r = 1.38$).

d) ‘Product’ is made up of three initial factors: ‘services’ ($r = .100$), ‘resources and attractions’ ($r = .69$) and ‘accessibilities and infrastructure’ ($r = .59$).

e) ‘Marketing’ is also composed of two initial factors: ‘image and promotion’ ($r = .148$) and ‘product differentiation’ ($r = 1.00$).

There is a relationship between economic activity and territorial development. Planning, governance, employment policies, human resources skills, demand indicators, business strategy, resources and attractions and the

promotion of differentiated products stand out as key areas for stimulating the economy and developing destinations. The model points to territorial development policies that encourage governance, innovation and planning. This development strategy must foster and support economic activity. Product innovation and differentiation involve the qualification of people and the network organization of stakeholders. Marketing is crucial in order to promote a differentiated image of destinations.

In summary, for Portugal to achieve the objectives defined by Turismo de Portugal (attract investment, develop knowledge, qualify human resources, innovate, differentiate products, intensify the use of ICT and work in networks with stakeholders) and implement the ‘Tourism Strategy 2027’ (Turismo de Portugal, 2017), the country needs to create conditions for tourism destinations to adopt the following guidelines and have the legitimacy to apply the most appropriate strategies:

- a) territorial planning and governance are key to tourism development;
- b) territorial economic development strategy should be leveraged by the results of the economic indicators of demand;
- c) human resource management in tourism must consider measures to attract and retain people with more personal skills and technical knowledge of the areas of activity in which they work. Therefore, it is crucial to define employment policies that improve conditions and work in the sector;
- d) competitive capacity and differentiation of tourism products depend on services, resources and attractions, accessibility and infrastructure; on endogenous products and incorporating the territory’s identity in the image and promotion of the destination. To this end, it is necessary to provide specific budgets for the different complementary areas of tourism, in which municipalities have an active voice.

It can even be considered that ‘Marketing’ is one of the factors of product development and positioning. For this reason, it is proposed that the ‘Tourism Destination Quality Model’ be made up of four dimensions (‘Development’, ‘Economic’, ‘Human Resources’ and ‘Product’) and 13 factors (‘planning strategy’, ‘governance’, ‘development strategy’, ‘economic factors of demand’, ‘work skills’, ‘employment policy’, ‘business strategy’, ‘services’, ‘resources and attractions’, ‘accessibilities and

infrastructure’, ‘image and promotion’ and ‘product differentiation’).

6.2 Emerging destinations (*Norte, Centro and Alentejo* regions)

Norte, Centro and *Alentejo* regions have been consolidating a very consistent tourism development and promotion strategy in recent years. However, they still show lower tourism attraction indicators than other Portuguese regions. Therefore, they are considered emerging destinations with a great potential, albeit with many gaps and needs. Perhaps these common difficulties explain the similarity of results found for these territories, despite their uniqueness and different specificities (see Table 9). These are three destinations with a very distinct identity in various areas, but with similar problems in terms of social and economic development, qualification of human resources and supply, product differentiation, investment attraction, modernization of organizational management, improved accessibility and development of infrastructure. All three regions have a very developed coastal zone, with a rich cultural, material and immaterial heritage, with excellent and diversified natural resources. However, each region has a large part of the territory affected by the negative features of inland areas, particularly depopulation.

The results reflect the objectives defined in the strategic plan for tourism for the *Norte* Region, when it proposes the development and consolidation of ‘anchor products’ and ‘complementary products’, which are reflected in true product differentiation. At the same time, this destination considers it crucial to develop the quality of the supply. In fact, this study corroborates this need by emphasizing the dependence in the territory between improving the economic indicators of demand and training human resources, product differentiation and modernizing marketing.

In the *Centre* Region, the results associate the respondents’ concerns about the governance model necessary to promote the territory’s economic development. In fact, governance, strengthening territorial identity, differentiation and transfer of knowledge are considered strategic areas in the official documents guiding the tourism strategy defined for the region. The *Alentejo* region, located in the south of the country, reveals aspects already analysed in the

previous regions, presenting somewhat similar results to the Centre Region. Once again, there is emphasis on the governance models associated with the region's development, business, resources and attractions, infrastructure and accessibility, marketing and human resources. In its strategic plan for tourism, the Alentejo region defends a networked organization of stakeholders, the combination of strategies, resources and opportunities, and joint definition of the strategic focus for products and the type of destination it is intended to build and promote. It is the only region that assumes this work should be led by a DMO which, at the regional level, is responsible for the regulation, development and promotion of tourism.

6.3 Destinations in development (Lisbon and Azores)

Lisbon and Azores are two contrasting destinations, but both are in high demand, especially in recent years. Lisbon enjoys unrivalled cultural resources, reflecting the romanticism and history attributed to both the city and surrounding areas. The Azores, on the other hand, along with cultural resources, possesses unique, unspoiled natural resources, which gives it a rare and singular beauty. However, these two regions, despite their high degree of internationalization, reveal characteristics of developing destinations, whose major challenge is their consistent and lasting consolidation at the international level. Therefore, they need to promote an integrated vision of tourism, developing new centralities that strengthen these brands, as well as innovative and attractive complementary products, inspired by their specificity. These two regions are aware of the need to work closely with local partners, strengthening joint working ties around an identity that further differentiates and diversifies their supply. The low or null values of the inter-correlations between factors are similar to those of the aforementioned regions.

The common needs of these destinations (one is a large metropolis and the other is an archipelago, where nearly pristine nature predominates) are fundamentally observed in the existence of low or zero correlations between the factors of the 'Development' scale and the factors of the 'Human Resources', 'Marketing' and 'Product' scales. Apparently, these results are incongruous or contradictory. However, if we

recall the items that formed the factors of the 'Development' scale, previously published by the authors, it is clear that they point to the responsibility for defining policies and strategies for territorial development, as well as for defining priorities for the allocation of support and investment funds. These items are associated with factors known as 'Planning Strategy', 'Governance' and 'Innovation Policy' (Figure 1). These areas have a direct impact on the local economy and marketing strategy, attracting investment and investors, on the definition of tourism products and on the ability to allocate conditions to attract and retain the most qualified human resources. The results revealed in the matrix of inter-correlations between the factors of different scales (see Table 9) point to similar needs in terms of accessibility and infrastructure, the planning of tourism services and products and the establishment of qualified human resources. Achieving these results depends on the type of policies defined. Regarding these, local leaders have no responsibilities and do not participate in their formulation. However, if it is understandable that this situation is reflected in the opinion expressed by the municipalities making up the Lisbon Metropolitan Area, given the centralizing feature of the definition of policies, it seems paradoxical when we observe similar results in a Portuguese region that enjoys political, administrative and financial autonomy, which is the case of the Azores. It is as if the municipalities of the Azores archipelago feel, in relation to the regional government, what the mainland municipalities feel in relation to the national government. In other words, it is necessary to rethink the organization, autonomy and legitimacy of DMOs responsible for tourism at the regional and local levels, if these leaders are to be involved in governance models in which they participate and take responsibility for meeting quality requirements. This requirement stems from the fact that tourism is a strategic sector for Portugal, which needs to be increasingly competitive internationally and where destinations at the local level are increasingly contributing to national economic outcomes. Tourism development in each of these regions faces different problems. The Azores struggles with serious consequences of a seasonal demand, especially in some islands with fewer resources. The negative effects of rapid tourism growth can be observed in Lisbon with this not being sustained by a planned and integrated long-term strategy.

6.4 Consolidated destinations (Algarve and Madeira)

Typically, the most common issues with consolidated destinations are their association with a single product. In the case of the Algarve and Madeira, the ‘sun and sea’ prevail. Therefore, these regions have set product diversification and innovation as strategic objectives. In the Algarve there is growth in golf tourism alongside luxury tourism, and in Madeira growing investment in tailor-made travel, organized around authenticity. As these are the most well-known Portuguese regions with a more established degree of internationalization, they are also the ones that show some signs of ‘wear and tear’, characteristic of a destination’s life cycle when it reaches the point of maturity. In these regions’ strategic plans, these problems are identified and relate to the modernization of supply and infrastructure, the retention of qualified human resources, investment in creative tourism and the inclusion of technology to serve stakeholders, tourists and residents. There is also a need to modernize tourism organizations’ functioning in general. Once more, the question of tourism quality assessment at the local level implies, in the perception of municipal leaders, a relationship between development, the economy, human resources and output. These seem to be the dimensions that will have positive or negative effects on tourism’s attractiveness, competitiveness, innovation and seasonality, which even sophisticated marketing campaigns cannot address. This finding is corroborated by the results in Table 9. It is understood that local decision-makers choose social and economic development, human resources and product as determinants of tourism quality. And that these are the main needs felt in Portuguese destinations, regardless of their stage in the life cycle, whether in the development, consolidation or decline phases.

Despite what has already been mentioned, there are some specificities inherent to the territories. In Madeira the results confirm the need,

already expressed in the documents on the strategic development of the territory, to modernize the structures and internal processes of organizations in terms of e-commerce and web marketing. This is fundamental in the internationalization of destinations, linking products to tourists, tourists, residents and organizations to markets, and production processes to human resources. However, when DMOs are unable to intervene in changing the policies that define accessibility and tourism infrastructure, it is difficult to adapt their action to implement the changes required at the stage of the destination’s life cycle. Paradoxically, this is one of the functions of the DMO, as it helps to modernize local organisations’ internal management, contributing to stimulating the economy.

For the Algarve, the situation is even more critical. Apparently, these results are incongruous or incomprehensible (see Table 9). But if a region wants to focus on luxury tourism, golf tourism, slow travel, cruise tourism, how can it do so if it cannot act in an integrated manner in social and economic development policies? If it has no responsibility for defining and implementing the policy and strategy for planning and development of the territory. If it has neither the means nor resources that can leverage the modernization of services, economy, education and infrastructure, among others. The relationship between the high level of territories’ economic development and tourism attractiveness is consensual. In this context, it is natural that the asymmetrical distribution of wealth observed in the region is an unfavourable factor for the implementation of the aspired strategies to strengthen the destination’s competitiveness.

In short, we need to rethink the organizational model of the DMOs at regional and local levels, as these are increasingly facing various challenges related to the constant external changes in tourism, and these public entities have major responsibilities for how tourism is carried out at the destination level, having to ensure the necessary conditions to satisfy the rapid changes affecting this economic sector.

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