

The State's role and the relevance of a strategical development plan in rural tourism: The Island of Madeira's case study

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Abstract: In this article we will describe the government's role in the development of rural tourism from a global perspective, while also addressing some key elements of the current implementation status set by government policies concerning the development of rural areas which have stimulated the increase in diversity of economic activities, resulting in an improvement of the living conditions for the rural community. In this context, rural tourism was considered an activity with the potential to grow the economy, create employment and retain the rural population, thus addressing the recent economic and social changes, while also supporting the growth of these rural areas meeting the new needs and social ambitions.

In Madeira Island, the State involvement in the development of rural tourism has played a decisive role in three predominant fronts: in formulating and executing in an orderly manner the regional and national policies; in creating tourist areas, but also regulating and managing them. On the other hand, there is still a long way to go, therefore this article has another purpose: to demonstrate the relevance of elaborating a Strategic Development Plan for Rural Tourism in Madeira Island, given the lack of specific orientations for this type of tourism.

In the pursuit of our goals we used the combination of qualitative and quantitative methods in the absence of studies of this nature on the island of Madeira, such as the launch of semi-structured interviews, field work and bibliographical and documentary research. The first objective was to identify the State's role in the development of rural tourism on a regional and national level and the second, to demonstrate the relevance of the release of the Strategic Development Plan for Rural Tourism in Madeira.

Key words: rural tourism, development of tourism, regional strategies, Madeira

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1. Introduction

In the last few decades, the decadence of rural means, given the evolution and convenience of urban means, caused issues that imposed the launch of new policies which tried to safeguard their territorial integrity and sustainable development.

According to Carminda Cavaco, rural development faces many challenges, but first of all it is important to establish the differences between urban spaces and the countryside: 'the countryside, in general terms, differentiates itself from urban spaces by the smaller population density and by the relative importance of agriculture in their economy and society, even in the more advanced and globalized societies' (Cavaco, 2004, p. 99). As for the weaknesses of the countryside, the same author mentions the following:

Continued reduction of the weight of agriculture in economy, reduction of agricultural efficiency, poor ability to attract investments to other sectors, unattractive living and working standards, environmental issues, associated with pollution, neglect, erosion, forest fires. Its importance does not stem from production only, but it relies also on the preservation of the environment, the landscape, the heritage, and other important elements of the identity of many populations (Cavaco, 2004, p. 99).

This really is a portrait of mainland Portugal, which is not identical to Madeira's, since two thirds of the Island is a part of a natural reserve and that its tourism is not a recent activity. Early on Madeira has been fighting for the preservation and conservation of our implemented heritage, including recovery and environmental protection measures. However, some rural areas, after Portugal joined the European Union (EU), felt the side-effects of the reduction of agricultural efficiency, rural neglect, erosion and associated forest fires. On the other hand, the Island's orography does not allow the usage of machinery to aid in the agricultural process, which, together with the EU directives, caused a massive abandon of agricultural land.

The increment of such areas, especially in rural areas, and the related structural changes affect a high number of countries and have a profound social and economic impact' (WTO, 2004, p. 9), which implies devising guidelines that target rural tourism's sustainable growth, since 'tourism can bring benefits to rural communities. Left unchecked, however, inappropriate tourism can also have an adverse impact on rural areas' (WTO, 2004, p. 14).

In Portugal, the biggest changes began registering in the early 1960's, 'from the productivist-technological paradigm of the 60's and the 70's, to the containment-conversion of the 80's, and at last, the conservation-protection of the 90's' (Cavaco, 2004, p. 101). The economic growth, the industrialization and the increase of economic transactions with the outsider world were the responsables by the intense agricultural and rural exodus which, associated with emigration, with the aging population and with the transition of the political regime, contributed to the uprising of social and cultural aspirations of the Portuguese people. As soon as Portugal joined the EU, the country went through a supplementary process of strict adjustments.

Currently the significance of tourism in the economic development of a country is an undeniable truth: 'It is an export industry and a hard currency earner that brings foreign visitors to a given destination to spend their money. It creates added value for economic problem areas such as abandoned city centres, as well as agricultural and remote areas' (WTO, 2007, p. 37).

In this scenario the high intensity of the rural/ urban dualism in Portugal is justified as well as the fact that in the late twentieth century rural development became one of the top concerns/ priorities for a country's policy:

In fact, tourism in general and in concern with rural means in particular, has been identified by many times in regional development programmes, as one of their main instruments, for being a generator of employment and inducing the growth of other activities and assets in relation to local resources [...]. Recently, however, the tourism potential, essentially connected to their natural, architectural and historical heritage inserted in the countryside, has been gradually receiving attention, both in theoretical and in practical terms in regional development (Batouxas, 1998, p. 2).

The global aim of those policies has been, mainly, to decrease the overwhelming imbalance existent in the countryside. The National Agricultural Policy was created based on three main axes: the agricultural competitive edge, the environment and rural development. The strong purpose was to reoccupy the areas deserted due to the reduction of traditional agriculture.

In this article, we will present the plans that define the prevailing economic and social development policies in Portugal and in the Island of Madeira, with particular emphasis on rural development, thus making possible to understand the need to implement a strategical plan for rural tourism's sustainable growth in Madeira.

2. The government's role in the development of rural tourism

For a long time the concerns about the countryside aimed to answer only specific problems related with agricultural activity. The rural and agricultural policy were one identical component of a country's social-economic development.

In the late twentieth century in Portugal we witnessed the regular formulation and implementation of national and community related rural development policies which favoured the tourism sector. These policies aimed to develop the countryside areas by stimulating the diversification of the economic activities and the consequential improvement of the living conditions of the countryside's inhabitants: 'In broad terms, this development model bets on, and manages the public investment in three fronts: agriculture, heritage and tourism [...]. On the other hand, the patrimonialization of a panoply of local resources, such as natural, historical and monumental' (Silva, 2009, p. 39). In this perspective, tourism was regarded as a vector capable of boosting the economy, generating employment and contributing to the fixation of rural populations, thus replying to the recent processes of economic and social change and valuing the rural development given the new social needs and aspirations:

Rural tourism, in its broadest and commercial sense, has been one of the most promoted activities between us in the last few decades, by scholars, technicians and elected officials. There is still a relatively small offer, of a few thousand beds, that is very diverse, scattered and unprofessional (Cavaco, 2004, p. 111).

The State's involvement in the development of rural tourism has played a major role in the formulation and sistematic implementation of national and community related policies, as well as in the production, management and regulation of tourist areas.

Due to the importance of tourism as a revitalizing instrument of local economies in vulnerable territories, the State has been following a highly interventional policy, creating eco-

conomic and financial instruments that support private investments, for example the direct funding systems from the Tourism Fund which preceded the diverse generations of the Financial Incentive System for Tourism Investment (SIFIT), which provided outright grants. In addition to these, there were others with less extent, however given the subject of this article, it is importante to focus our analysis on the more recent national policies and mainly on the community related policies which led to the launch and/ or requalification of some of the tourism ventures that were inserted in the empirical universe of our study.

In the context of the implementation of national and community policies, we will now briefly describe the rural development programmes that were in place during the period of this present investigation.

On the 4th of January of 2008 the Decree-Law no. 2/2008 was published, through which the governance model for the programmation of rural development tools was established for the period of 2007–2013. The Strategic National Plan (PEN) and the programmes financed by the European Agricultural Fund for Rural Development (FEADER) were some of which were considered as tools. In turn, the PEN was developed through three Rural Development Programmes (RDP), from a territorial point of view:

- The Rural Development Programme for the Mainland, whose territorial incidence corresponds to the mainland;
- The Rural Development Programme of Azores, whose territorial incidence corresponds to the Autonomous Region of Azores;
- The Rural Development Programme of Madeira, whose territorial incidence corresponds to the Autonomous Region of Madeira.

These organizations are composed entirely of public sector entities, which demonstrates the considerable role of the State in Portugal's rural development policy.

In the Autonomous Regions, the Regional Governments of Madeira and Azores set in specific legislation of nature, composition and competences of the managing authorities of the Rural Development Programmes and also appointed their respective managers, which rely on the competent Regional Governments' bodies.

Through the PEN, the community strategic guidelines were conjugated with the national policies, namely the global purpose to achieve significant gains in the improvement of the competitiveness and prosperity of rural territories and companies. The National Strategy's priorities were consistent with the community's, which can be evidenced when comparing the National Strategy's goals with those of the community's policies: 'it is verified that the recommended measures in the National Strategy are contributing to meet the goals set by the EU's policies' (PEN, 2007, p. 80).

As for the Madeira Autonomous Region, the Rural Development Programme (2007–2013) was approved by the COM (2008) Decision no. 721 of the 15th February 2008, which is why its implementation dates to 2008, having been published the Regional Legislative Decree (Reg. Leg. Dec. no. 11/2008, of the 22nd of April) which set the programme's conditions. On the 30th of April of the same year, the regulations for the first measures were published.

In addition to the more targeted policies for rural development, where actions related to Rural Tourism are integrated, the Madeira Autonomous Region features, in the planning domain, a Tourism Development Plan which is the tool for territorial management of Madeira's

tourist sector, therefore it defined the strategy for Madeira's tourism development and the territorial model to adopt. This document intended to ensure the balance between the accommodations' territorial distribution and tourism related equipment and consequently better value and use human, cultural and natural resources.

According to the Tourism Development Plan, the territorial distribution and the characteristics of tourist ventures should integrate perfectly in their own social and cultural milieu, thus adapting to the realities of the different areas and contributing to the local development.

One of the meager references to rural tourism found in the Tourism Development Plan was inserted in the strategical axle, more precisely in *Complementary offer: Formatting in network and diversifying and requalifying the offer*. In the context of exploring the thematic offer by geographical areas associated with the endogenous resources, only the municipality of Santana was focused as *the center of rural tourism*, thus determining that this municipality's strategy would be to 'value Santana's ethnographic component, the history of the modus vivendi of the people of Madeira, the articulation between tourism and the countryside' (POT, 2002, p. 25).

Ultimately, rural tourism was again highlighted in the matter of 'Territorial decentralization of supply associated with the diversification of typologies and local tourism products (rural tourism, rental accommodation, agrotourism, inns, small hotel units in urban centres and in rural areas, Madeira's farms)' (POT, 2002, p. 27).

In the current year (2015), the Tourism Development Plan is under restructuring. To this date the new document has not been published, which prevented us from checking if Rural Tourism in Madeira will be granted greater emphasis, in the horizon of 2020.

However, a study named *Strategic document for tourism in Madeira Autonomous Region* was undertaken, and presented publicly on the 23rd of January of the current year, in which there was not identified any specific action for rural tourism in Madeira (ACIF, 2015).

Bearing in mind the structural social and economic situation of Madeira Autonomous Region, aggravated by a number of facts, among which its insularity, the Region is classified as an Outermost Region (RUP), according to the European Union Treaty's no. 2 of the article 299.

The archipelago of Madeira has been an autonomous region since 1976, with a political and administrative autonomy, a Statute, and 'its own place' in the European Union's Treaties, therefore the Region's external action 'articulates three participation levels: European, bilateral and multilateral' (PG, 2011, p. 19).

In the current Government's Programme a particular emphasis was given to fulfill the Outermost Regions' Statute and to adopt solutions in line with it that protect the Madeira's agenda and lead to a 'smart, sustainable and integrating growth like the Europe 2020 Strategy advocates' (PG, 2011, p. 21). As for Tourism, the Programme considered it as 'one of the fundamental pillars of the social and economic structure in the Madeira Autonomous Region and as such the continuity to the existing incentives' systems, thus reinforcing the support to the sector's companies which develop or wish to invest in inovative and integrated projects, hence fostering the decentralization, the diversification and requalification of supply' (PG, 2011, p. 76) became clear.

Despite the Government's Programme did not focus specifically on actions with the intent to develop rural tourism, these are inserted in the chapter of *Tourism* in general, but also

in the chapter of *Agriculture and rural development*, where the following is stated: ‘The Regional Government will intensify the support for the development of biological agriculture and livestock farming, which integrates itself perfectly in the sustainable growth strategy based in the connection between Tourism, Culture, the Environment, Agriculture and a healthy way of life’ (PG, 2011, p. 86).

Regarding Madeira’s Rural Development and its relation with Tourism, in the current Government’s Plan we can read the following:

Agriculture and tourism are symbiotic economic activities, interrelated and priority, overlapping each other, rationally and if needed, others that jeopardize the attractiveness and progression of the same, as priority activities, which constitute the main axle for Madeira’s economic development. In this scenario, Madeira’s Rural Development strategy, also molded into the Government’s Programme, will ensure the articulation between the multiple available rural and farming policies’ tools, implying the full and criterious application of community funds, directed to investment, like FEADER, and to efficiency, like FEAGA, through Regional Programmes, with the double purpose of maximizing our strong points and taking advantage of the opportunities that come, and on the other hand, of minimizing structural difficulties (PG, 2011, p. 82).

3. Methodology

Results from a broader study were used in the present article, concerning the development of rural tourism in Madeira, focusing primarily on the Country Homes and their implications in the preservation and recuperation of regional heritage, seeking to contribute to a more profound knowledge concerning the development of the Island’s rural tourism and the definition of future strategies.

In this perspective and in general terms, the following objectives were set, in the elaboration of this article:

- to identify the State’s role in the Development of Rural Tourism on a regional and a national level;
- to demonstrate the relevance of the release of a Strategic Development Plan for Rural Tourism in Madeira.

In order to pursuit our objectives, a bibliographical and documentary research on the theme and concepts implicated was conducted. To that effect we resorted to primary and secondary sources.

The non-existence of studies concerning rural tourism in Madeira confronted us with the need to use the combination of qualitative and quantitative methods, such as the launch of semi-structured interviews and questionnaires extensively conducted to many informers, in particular to businessmen and tourists, as well as field work. This supplied us with valuable data through the information gathered which allowed us to fulfill our objectives.

According to the Portuguese legislation, tourism enterprises in rural areas can be graded under three groups: Country Homes, Agro-Tourism and Rural Hotels.

In 2012, when this investigation was launched, Madeira Island had 34 Country Homes, three Agro-Tourism enterprises and two Rural Hotels. Based on this scenario and taking into account the differences between the three modalities, we have chosen to study the Country Homes: 'properties located in villages and rural areas which, for their architecture, building materials and other characteristics fit in with the typical local architecture' (Decree-Law no. 228/2009, of the 14th September).

Regarding the 34 Country Homes existing in Madeira, 16 of them agreed to collaborate in the present study, which ensured a good representation of the sample (47%), in relation to the number of ventures and geographical localization, as with the number of replies to the interviews, in relation to the universe in question.

We opted to conduct the interviews to the owners or representatives of the Country Homes, between the months of June and October of 2012.

The present study was supplemented by the investigator's visit to the collaborative Country Homes, this aimed to deepen their knowledge about the facilities and its surroundings. These visits allowed us to compare what we had observed and the knowledge acquired previously, as well as to make relevant conclusions that aided our description and interpretation of the reality in question.

4. Results

According to the conducted research and previous presentation in this article, of the existing national and regional plans, into force to date, it is possible to conclude that Madeira has no strategic plan for the development of the region's rural tourism, which has been the subject of debate in Portugal: 'the discussion carried out showed the need to elaborate a rural tourism development model, multifaceted, given the diversity of situations (contexts) of the projects and regimes (institutional, legal and financial)' (AAVV, 1993, pp. 30–36), and in Europe:

The rural people themselves should be the main actors of rural tourism to be the first beneficiaries. But the spontaneous hospitality must be accompanied by training in the tourist reception, private initiative must be part of a collective plan for overall development and the contribution of each should contribute to the development of tourist products, offering the visitor-consumer the opportunity to meet their needs of accommodation and catering, discovery and hiking, cultural events, activities and leisure. [...] Rural tourism is also conducive to partnership, whether the partnership is between the public sector and the private sector, or partnership between sector stakeholders in rural tourism development, from local to European level [...] the double concern [...] requires upgrading—and this seems to be true for all states—the marketing and sale of rural tourism products, both through better organization at the local level and cooperation at European level (CE, 1993, pp. 5–8).

In the Autonomous Region of Madeira, the State's role in the promotion and supervision substantiates in the Regional Department of Culture, Tourism and Transportation and in the Promotion Agency.

The Regional Department of Culture, Tourism and Transportation (SRT) is a department of the Regional Government of Madeira. The SRT is in charge of defining, coordinating, executing and evaluating the regional policy in the sectors of culture, tourism, transportation, the community and also parliamentary affairs.

The tourist promotion of Madeira as a destination, in addition relying on the SRT, given that one of its tasks is to 'Plan and coordinate the Region's promotional strategy as a tourist destination, its brands and products, as well as stimulate in a concerted manner the promotional actions', it also relies on the action of the Autonomous Region of Madeira's Promotional Association (AP Madeira).

This is a non-profit association, funded in August of 2004. It is composed of two entities, a public and a private one: the Regional Directorate for Tourism (DRT) and the Commercial and Industrial Association of Funchal (ACIF).

Given the importance of tourism as a regional development factor, one understands the State's role in the defense of its potential:

There are, in fact, multiple and highly visible impacts, direct, indirect and induced. Transversal, global activity with fluid boundaries, interfering with social and economic fabric, the demographic and employment dynamics, the natural and cultural heritage, the behaviours of populations, the planning and management of territory. It animates the social services and products market, thus making viable the corporate fabric and the other more diverse professional fields. It surprises nobody that it has come to know a growing integration in the territorial and sectorial development programmes, namely those which concern the promotion of the countryside (Mendes, 2010, p. 656).

During the visits and interviews to the Country Homes' owners/ representatives they were asked several questions about the development of rural tourism in Madeira.

One of the first questions asked was about the difficulties that the Country Homes face nowadays. Of the 16 'Homes', 13 stated that this type of tourism was struggling (81.2%), the remaining three homes expressed slightly different opinions: one recognized that there was no difficulty whatsoever, another stated that they 'did not know' and the third and final one answered us in the following way: 'the same as tourism in general'.

The houses that confirmed the existence of difficulties in this tourism sector pointed out the main following issues:

- the low occupancy rate;
- seasonality;
- unfair competition by unlicensed establishments;
- the lack of appropriate promotion.

When asked about the possible solutions to overcome these problems, the owners were unanimous regarding the key actions that should be taken:

- improve the tourism promotion of this type of tourism, especially on the Internet;
- improve the dissemination of the Region's tourism resources, mainly in the event and cultural attractions circle;
- increased supervision by competent authorities;

– increase the associationism in rural tourism.

The difficulties presented by the Country Homes' owners/ representatives in Madeira and the analysis that we made on the State's role in Rural Tourism mirror the pressing need for a more active role by the State in establishing the principles for a sustainable rural tourism, as well as in the elaboration of a strategical plan for the development of Madeira's Rural Tourism.

According to the World Tourism Organization (WTO), the process for the creation of a Rural Tourism Master Plan, after the principles for a more sustainable rural tourism have been set, involves two fundamental steps: *Step 1—Rural Resource Audit and Market Appraisal*; *Step 2—Rural Tourism Master Plan*, given that:

The Master Plan itself will be underpinned by a tourism product development program designed to meet market needs and address the gaps identified in the Audit. Proposals relating to accommodation registration/ standards, design guidelines, environmental protection and enhancement, organizational structures, marketing, training and investment are critical in ensuring an effective Rural Tourism Master Plan (WTO, 2004, p. 17).

5. Conclusions

Growth in rural tourism is difficult to quantify, because Madeira Island, as well as some other places, doesn't collect statistics in a way which separates purely rural from other forms of tourism. However, 'WTO considers that there is an important potential market for rural tourism [...]. It is estimated that three per cent of all international tourists travel for rural tourism purposes and rural tourism is estimated to be growing at an annual rate of around six per cent, well above the growth rate for all tourism' (WTO, 2004, p. 9).

Clearly, rural tourism in Madeira Island, while still only a minority tourism market, is already making a valuable contribution to rural economy. Its contribution can be expressed not only in financial terms, but also in terms of jobs, contributions towards funding conservation, recuperation and preservation of the Island's natural and cultural heritage, and the injection of a new vitality into some weakened rural areas.

Through the presented study based on bibliographical research and on the results of the surveys conducted to the owners or representatives of the Country Homes of the island of Madeira, we can conclude that the State has been playing a major role, characterized by moderate actions in the developing of rural tourism in the Autonomous Region of Madeira, despite the fact there is not a strategic development plan for rural tourism in the region, which could affect the tourist demand in a positive way: 'It seems to us that the activity, being feasible and desirable, should be thought of as a contribution far more important, and integrated into a development plan' (Casqueira, 1992, p. 215).

For these reasons and considering that 'Rural Tourism allows a diversification of components of rural economies, which would otherwise be condemned to disappear, entailing high human and economic costs. It also allows to maintain, to protect and even to enhance our heritage and our patrimony' (WTO, 2004, pp. 9–10), it becomes essential for rural tourism's sustainable growth in Madeira to establish a Rural Tourism Master Plan.

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Rola państwa i znaczenie planu rozwoju strategicznego w turystyce wiejskiej – przypadek Madery

Abstrakt: W niniejszym artykule opisujemy rolę rządu w rozwoju turystyki wiejskiej z perspektywy globalnej, jednocześnie omawiając także niektóre kluczowe elementy obecnego statusu wdrożenia polityki rządowej w zakresie rozwoju obszarów wiejskich, która pobudziła wzrost zróżnicowania działalności ekonomicznej, czego skutkiem jest poprawa warunków życia społeczności wiejskiej. W tym kontekście turystyka wiejska została uznana za działalność posiadającą potencjał dla rozwoju gospodarki, tworzenia miejsc pracy i utrzymania populacji wiejskiej, nie pozostając bez wpływu na ostatnie zmiany ekonomiczne i społeczne, a jednocześnie wspierając wzrost tych obszarów wiejskich, które realizują nowe potrzeby i społeczne ambicje.

Na Maderze zaangażowanie państwa w rozwój turystyki wiejskiej odegrało decydującą rolę w trzech głównych wymiarach: w formułowaniu i porządko-

waniu polityk regionalnych i narodowych, w tworzeniu obszarów turystycznych, ale także w regulowaniu ich i zarządzaniu nimi. Z drugiej strony droga, którą należy przejść, jest wciąż długa, w związku z czym artykuł ma jeszcze jeden cel: wykazać istotność opracowania Planu Rozwoju Strategicznego dla Turystyki Wiejskiej na Wyspie Madera, przyjmując, że brakuje konkretnego ukierunkowania tego typu turystyki.

Dla osiągnięcia naszych celów zastosowaliśmy kombinację metod jakościowych i ilościowych z uwzględnieniem braku badań tego typu na wyspie Madera. Składało się na nią zapoczątkowanie wywiadów częściowo ustrukturyzowanych, badań terenowych oraz badań bibliograficznych i dokumentalnych. Pierwszym celem była identyfikacja roli państwa w rozwoju turystyki wiejskiej, drugim zaś – wykazanie znaczenia opracowania Planu Rozwoju Strategicznego dla Turystyki Wiejskiej na Wyspie Madera.

Słowa kluczowe: turystyka wiejska, rozwój turystyki, strategie regionalne, Madera