The **Cultural Tourism Market** in Portugal

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Abstract | Tourism is increasingly offering a range of cultural products, from visiting monuments and traditional arts and crafts centres, to participating in historical events and discovering unique lifestyles. Tourism creates an interest in these particular forms of culture, often encouraging the preservation of cultural and historical traditions, contributing to the protection of cultural heritage and to a renaissance of local cultures, cultural arts and crafts. The relationship between tourism and the cultural sector is potentially highly complementary. The cultural sector creates attractions for the tourist while tourism supplies extra audiences for cultural events and activities. Market segmentation coupled with target marketing is on the increase and cultural tourism could prove a worthwhile sector (Tighe, 1985).

Because culture is the key and many times the primary reason for visiting certain tourist destinations, since 1992 the Association for Tourism and Leisure Education (ATLAS) has conducted surveys and acted as a Eurobarometer for cultural tourism in Europe (see www.geocities.com/atlasproject2004). ATLAS is an international association of higher education institutions and other organisations that promote transnational teaching and research of tourism, leisure and related subjects (www.atlas-euro.org).

ATLAS carried out a worldwide survey in 2004, designed to gather information on the visitors to cultural events and attractions, including their holiday motivations, socio-demographic profiles and consumption patterns. In Portugal, the survey was carried out by several partners, under the coordination of the Laboratory of Tourism of the Polytechnic Institute of Viana do Castelo. This paper sets out to establish a profile of the cultural tourist in Portugal, based on the ATLAS survey at a wide range of different sites and types of attractions and locations in six of the seven tourism promotional regions of Portugal. The partners that took part in this survey were all volunteers. The Azores was the only region in which the survey was not conducted. Several local organisations were contacted, but none volunteered.

Keywords | Cultural Tourism, Portugal, Visitor's Profile.

Resumo | A cultura assume actualmente, e cada vez mais, um papel determinante na oferta turística, assistindo-se à proliferação de ofertas associadas ao que se entende por Turismo Cultural, desde a visita a monumentos e centros de artes e ofícios à participação em eventos de carácter histórico e etnográfico, testemunhos de contextos sociais e culturais únicos. Considerando a relação de complementaridade explícita entre cultura e Turismo, podemos afirmar que este

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último, enquanto actividade económica pode contribuir, não só para a sensibilização e tomada de consciência quanto à necessidade de preservação do património cultural, em todas as suas vertentes, como para a sua própria revitalização e valorização. A identificação de ofertas de turismo cultural apelativas e capazes de ir ao encontro das expectativas dos turistas é determinante para a competitividade dos destinos, dependendo em grande medida do *marketing* e esforço de segmentação dos mercados (Tighe, 1985).
Dada a relevância da cultura enquanto atracção primária de muitos destinos turísticos, a ATLAS – *Association for Tourism and Leisure Education*, cujos associados são, entre outras organizações instituições de ensino superior, e que tem como missão promover a investigação e o conhecimento do turismo e lazer, tem vindo a implementar um conjunto de iniciativas no âmbito da sua actuação como Barómetro para o Turismo Cultural na Europa (www.geocities.com/atlasproject2004).
Nesse âmbito, foi implementado um projecto internacional em 2004 com o intuito de recolher informação relativa ao turista cultural na Europa, incluindo dados sócio-demográficos com vista à identificação do seu perfil, mas também dados relativos às motivações e comportamentos. Em Portugal, o estudo foi coordenado pelo Laboratório de Turismo do Instituto Politécnico de Viana do Castelo e contou com a colaboração de várias instituições. Esta comunicação tem como objectivo apresentar uma síntese dos resultados do inquérito por questionário aplicado junto dos visitantes a diversas atracções e eventos de índole cultural em seis das regiões turístico-promocionais do país.

Palavras-chave | Turismo Cultural, Portugal, Perfil do Visitante.

1. Introduction

In recent years a large part of tourism has shifted from the usual "vacation" to multiple special interests tourism. A large part of these special interests tourism includes cultural tourism. Tourists are seeking more cultural diversity to escape the global uniformity. A growing number of visitors are becoming special interest travellers who rank the arts, heritage and other cultural activities as one of the top five reasons for travelling. These visitors are known as cultural tourists. Cultural tourism is an entertainment and educational experience that combines the arts with natural and social heritage and history (Ramchander and Wilson, 2004).

In fact, cultural tourism has been identified by the European Commission as one of the most important segments of the European tourism market. Cultural tourism can play a vital role not only in the expansion of the tourism industry, but can also help to conserve local culture, to support cultural facilities and to provide employment and income for local people. But who are the cultural tourists? What are their motivations? Where do they go? These essential questions are still very difficult to answer, which indicates that the market is still not very well understood (Richards, 1996). In order to identify and characterize current and potential cultural tourists, it is recommended that market analysis that constructs tourist profiles be conducted. Such a profile should aim to address the tourist´s point of origin, length of stay, sought-after attractions and services, means of travel to and throughout the region, as well as the reason for travel. The market data are also useful in identifying barriers and opportunities for cultural tourism development (Fraser, 2001).

At the ATLAS Cultural Tourism Research Group in 2003, there was some development of the debate about the nature of the study of cultural tourism, however, with the debate seeming to move away from the cultural "content" of tourism (high culture, popular culture, etc.) towards the "context" in which culture is consumed (as part of a process of learning about a city, as a process of distinction, repeat visitors versus first time visitors, etc.) (Richards, 2004). Although it is not the objective of this paper to go into detail on the varied definitions of cultural tourism as proposed in recent literature (see WTO, 1985; Bonink and Richards, 1992; Bywater, 1993; Richards, 1996, 2001; Littrell, 1997; McKercher and du Cros, 2003), there is a need for in-depth research into the possible differences and similarities in behaviour by tourists to cultural destinations, the typology of cultural attractions and tourist behaviour variables (Plog, 1990; Pizam, 1999; Crotts and Erdmann, 2000). Richards (2001) proposes the following typology of cultural attractions:

– *Monuments*. The traditional basis for cultural tourism, they are on many occasions identifying symbols of the image cities use to promote themselves. Cathedrals, mosques, public places and so forth are in themselves tourist attractions within the cities to which they belong;

– *Museums and art galleries*. The most important item in cultural tourism, formed by the exhibitions of various heritages: artistic, cultural and historical, among others. It would be easy to list hundreds of museums, including those in cathedrals or churches, as well as art galleries;

– *Great cultural exhibitions*. This is a product normally arising from a combination of the previous two;

– *Landscapes and nature*. Areas marked by the appeal of their natural features;

– *World heritage sites*. This is a title awarded by UNESCO from 1972 onwards, referring at first only to single monuments, later also to urban areas and cities, and, nowadays, in addition to integrated groupings with an environmental, historic-religious or archaeological content;

– *Cultural routes*. These are genuine features that enrich the system of cultural tourism. In Spain the Pilgrim Way of St. James stands out, being considered the prime European cultural itinerary, with World Heritage status (1993). However, there is also the Silver Route, whose historical origin was originally the roadways that linked the South-West of the Iberian Peninsula to the North-West for trade in metals;

– *Language study*. Geographic areas attractive to study a correct language;

– *Cultural parks*. Their aim is the preservation of the rural archaeological heritage. Their roots lie in the landscape where they are located, due both to its archaeological significance and to its natural appearance. They also include a display and study component, in the shape of information centres, guide services and informative signs. In addition, they are considered Sites of Cultural Interest, having scientific facets, careful conservation, an infrastructure that may be visited and hence social benefits;

– *Cultural legacy*. For example, the result of the encounter and co-existence of two cultures in a specific region, with each displaying specific values, hence protecting, preserving and spreading a cultural heritage;

– *Popular celebrations*. The outcome of religious and civil traditions, these have won such popularity that they have become tourist products. Many could be mentioned in Spain, but the most popular are Easter, April Fair and Carnival;

– *Festivals*. These are currently thriving, and are characterised by diversity and specialisation: there are music, cinema and theatre festivals among others;

– *Ethnographic and gastronomic heritage*. This is intended to preserve the folk heritage of the various regions of a country: lands, houses and other typical buildings, farm equipment, tools and the like, together with the recuperation of skills and crafts that are in danger of disappearing, such as harvesting crops and features of animal husbandry. It also deals with local crafts, regional costumes, economic activities and traditional cookery, and thus includes gastronomy. It can be a major attraction differentiating regions within the country. Representative examples of it would be folk gatherings, with their ethnographic interest, or the way that typical local foodstuffs are on offer almost everywhere in the country;

– *Industrial heritage*. This has its source in places where the Industrial Revolution took place, areas either providing raw materials or having a concentration of industries. Nowadays, these are gaining an important tourist attraction status as the result of efforts to rehabilitate the traces of early industrial activities as the origin of modern society;

– *Cities*. These are centres for the development of cultural tourism, as they include elements, which allow a broadening of the range of cultural, and tourist attractions on offer without any need for major intervention.

Culture has always been a major object of travel. Actually, nowadays, tourism is culture. Because of the increasing pace of life people have turned to the preservation of the past. It seems that the combination of nostalgia for the past, the need to reassert national and local identities and the perceived economic benefits of cultural development have had a dramatic effect on the supply of cultural attractions (Smith, 1989). The relationship between tourism and culture requires the study of the profile of visitors, their holiday motivations and consumption patterns in order to define what attracts the potential tourist to visit a certain destination.

In Portugal, the amount of research conducted on cultural tourists is completely inadequate given its potential in terms of the wide range of different types of cultural attractions and cultural resources. The Polytechnic Institute of Viana do Castelo gathered data about the visitors to cultural attractions and events in Portugal in 1997, 2000 and 2004. The aim of the present paper is to present the results of research conducted in 2004 at the national level. Further analysis is being undertaken, with results being disseminated in separate papers.

2. Methodology

A profile of the cultural tourist in Portugal is based on consumer research undertaken under the cultural tourism survey co-ordinated by the Association for Tourism and Leisure Education (ATLAS). The aim of the research programme in 2004 was to analyse the motivation, socio-demographic profile, consumption patterns and image of tourists visiting cultural attractions and events. The basic objectives of the research were:

– To identify the basic motivations of tourists for visiting specific cultural attractions and locations;

– To analyse the image of the destination from the cultural tourist perspective;

– To analyse the socio-demographic profile and origin of cultural tourists;

– To examine the activities undertaken by cultural tourists in the destination, and their use of tourism intermediaries and suppliers (tour operators, accommodation suppliers);

– To provide data on the use of information and marketing channels by cultural tourists.

Coordination in Portugal was conducted by the Laboratory of Tourism of the Polytechnic Institute of Viana do Castelo. A standard questionnaire was used, translated into different languages and capable of being self-completed or interviewer-administered. The sample counted with 3364 respondents visiting selected cultural tourism sites and/or events in different regions of Portugal. Sites included historical centres, museums, crafts fairs, monuments, festivals, religious spaces and archaeological areas. Geographic distribution is based on the established promotional regions of Portugal. Azores was the only region in which the research was not conducted (Table 1).

Table 1 | Number of questionnaires by region

Region	Number	%
Oporto and Northern Portugal	1 045	31,1
Central Portugal	1 005	29,9
Lisbon and Tejo Valley	649	19,3
Alentejo	265	7,9
Algarve	200	5,9
Madeira	200	5,9
Total	3 364	100,0

Results of the survey will permit an analysis of the cultural tourism market in terms of market size and value; establish a motivation and socio-demographic profile, while looking in particular at the expenditure and consumption patterns of tourists visiting cultural attractions and events in Portugal.

3. Presentation of the results

3.1. Profile of the respondents

The sample consisted of an even distribution by gender, 50% each male and female. Aggregating the age groups, 67% of respondents fall between the ages 20 and 49, an additional 5% aged 19 years or younger and 28% aged over 50. The majority of visitors (60%) had a higher education degree. Of those, 41% had a Bachelor Degree and 19% a Master or Doctoral degree. An additional 21% completed secondary school, 16% vocational education and 3% did not go past primary school.

An important characteristic in culture consumption is visitors' high level of educational attainment. Moreover, the level of educational qualification of respondents had a major connection to the occupational group. More than 30% indicate that their current occupational group are the professions, e.g. doctor, lawyer, teacher, etc. A further 18% describe their current occupation as technical profession and 17% as director or manager. Other occupations like service and sales personnel (15%), clerical/administration (14%), manual and crafts worker (5%) show a lower percentage.

An analysis of the annual household gross income group, points to 18% of respondents falling between 20 000 and 30 000 Euro. Another 16% earn between 10 000 and 20 000 Euro and 15% between 30 000 and 40 000 Euro. A further 7% have income falling between 50 000 and 60 000. There are still a considerable percentage of respondents earning more than 60 000 Euro (12%). Although the question concerning income has always been sensitive to many visitors, the percentage of refusals is relatively low (22%).

Asked about their current place of residence, over 65% of respondents were from abroad, followed by visitors from other areas of Portugal (26%) and 8% were local residents. As the questionnaires were conducted mainly in the high tourist season, it was expected that the biggest proportion of respondents would be foreign rather than domestic visitors. In total, there were 51 different nationalities. The top five source markets represent over 70% of the sample. This list is comprised of Spain (22%), France (20%), United Kingdom (10,4%), Germany (10,4%) and Portugal (8%). Other countries mentioned include: United States of America (4,6%), The Netherlands (4%), Italy (3%), Belgium (3%), Brazil (2,4%), Canada (1,9%), Switzerland (1,3%) and others.

3.2. Motivations for travel

In order to analyse tourists´ motivation according to the type of holiday taken, the first step was to explore the primary purpose of the visit. More than 67% visited the area for holiday purpose, 7,3% came precisely to attend a cultural event and 6,4% were visiting friends and relatives. A low percentage of visitors came for business purposes (2,5%), to attend sports events (1,8%) and for shopping purposes (1,2%). The remaining 8,5% came for other motives.

The next step was to identify the type of holiday taken: cultural holiday (35%), sun/beach holiday (24%) and touring holiday (20%). Eco/nature holiday, city trip, rural and health/sports holiday scored a much lower percentage – between 4% and 9%. Curiously, cultural holiday had a low percentage of holiday purpose considering that the survey was conducted at the site of cultural events and attractions. This suggests that regardless of the type of holiday being taken, tourists are keen to visit cultural attractions. Regarding the type of holiday identified by tourists, it is interesting to compare the results according to current place of residence (Table 2).

Table 3 compares the type of holiday by country of origin. For example, consuming sun/beach holiday in Portugal is the most often referred among French visitors. Later it will be demonstrated that these visitors tend to stay longer than visitors from other countries.

A total of 17% of French respondents declared that the number of nights they spent in the area was between 16 and 30 days, with another 7% claiming to spend over a month. Given the large number of Portuguese who migrated to France in the last five decades, it is possible that these "French" visitors may actually be first generation emigrants spending their holiday at their place of origin, or second generation emigrants exploring their cultural roots. Official statistics indicate that this segment of visiting friends and relatives usually stay for a longer period.

Portugal, as a cultural destination, is most attracted by tourists coming from France (24,2%) and Spain (22,7%). Health and sport holiday is favoured by German (32,5%) and, to a lesser extent, UK (14,5%) tourists. Visitors from France were more interested in ecotourism/nature holiday (30,8%), rural holiday (26,3%) and touring holiday (17,6%). City trips were most common among Spanish and German tourists, with 37% and 16,3% respectively. City trips tend to be secondary trips; they do not replace the traditional annual holiday.

Having described the tourists' primary purpose of visit and the type of holiday taken, a detailed analysis of their motivations was conducted. Tourists' motivation differs according to the type of holiday they choose. The three main motives for going on sun/beach holiday are "experience the atmosphere" and "learn more about the culture of the area and be

Table 2 | Type of holiday by current place of residence

Current place of residence	Type of holiday (%)						
	Sun/beach holiday	Cultural holiday	Health/sport holiday	Ecotourism/ nat. holiday	Rural holiday	Touring holiday	City trip
Local area	1,5	1,4	3,4	1,0	2,6	0,4	2,2
Rest of the country	20,4	19,6	22,4	27,2	32,5	11,9	11,5
Abroad	78,1	79,0	74,1	71,8	64,9	87,6	86,3

Table 3 | Type of holiday by country of origin

Country of origin	Type of holiday (%)*						
	Sun/beach holiday	Cultural holiday	Health/sport holiday	Ecotourism/ nat. holiday	Rural holiday	Touring holiday	City trip
France	20,6	24,2	9,6	30,8	26,3	17,6	10,3
Germany	15,8	11,0	32,5	15,4	16,1	12,6	16,3
Portugal	8,2	5,9	3,6	4,8	2,5	3,5	2,7
Spain	15,2	22,7	9,6	15,4	22,0	19,6	37,0
UK	16,2	10,2	14,5	7,7	11,9	11,1	5,4

* Based on total respondents of actual holiday.

entertained". Similarities occur concerning the main motivations of tourists on any of the following type of holidays: health/sports holiday, ecotourism/nature holiday, rural and touring holiday. Tourists currently on one of these types of holidays describe their main motives for visiting the destination (in descending order) as "having the desire to experience the atmosphere" and "learn more about the culture and to learn new things". Visitors on a cultural holiday or city trip define their motives for visiting the area (in descending order) as "wanting to find out more about the culture" and "experience the atmosphere and learn new things".

3.3. Behaviour during the visit

The most visited attractions are related to traditional culture. Monuments represent the most visited cultural attraction (64%). This contrasts with other regions of Europe where the most visited attraction is museums. Then, historical sites (56,5%), museums (53,6%), religious sites (46,7%), heritage/craft centres (27,2%), traditional festivals (18,1%), art galleries (14,6%) and theatres (5,8%). Popular culture attractions, including cinemas, dance events, pop concerts, world musical events and classical music events, had a much lower percentage of visitors – between 3,4% and 6,8%. Most respondents claim to visit at least one attraction in the area.

It was also possible to analyse visits to attractions according to age groups. Presumably, visitors of different ages have different interests in the type of attraction to visit. The most commonly visited attractions by all age groups were monuments, museums, historic sites and religious sites. An exception was the age group of 16 years and younger that showed relatively low interest in these types of attractions. Over 40% of visitors with a minimum of a bachelor´s degree visited cultural attractions.

Tourists on different holidays have also different motivations. The same can be said about the most visited attractions and the type of holiday. Table 4 shows that respondents tend to prefer traditional cultural attractions. 75% visit monuments, 65% historical sites, 60% museums, 55% religious sites and 31% heritage/craft centres. The highest consumption of cultural attractions is by tourists who described their type of holiday as "cultural". On the other hand tourists taking sun/beach holiday have also a high percentage of culture consumption. Nearly 60% of respondents taking a sun/beach holiday visited monuments, 47% visited historical sites and 42% visited religious sites.

3.4. Repeat visits

Another factor that plays an important role in visitor motivation is repeat visit. For 55% of

Table 4 | Most frequently visited attractions by type of holiday

Type of holiday	Most frequently visited attractions (%)				
	Museums	Monuments	Religious sites	Historical sites	Heritage/craft centre
Sun/beach	8,9	13,9	9,8	11,1	6,4
Health/sports	1,9	2,0	1,2	1,9	0,8
Cultural	22,4	26,5	20,5	23,3	11,1
Eco/nature	5,4	6,0	4,5	5,5	3,6
Rural	3,1	3,7	3,0	3,2	1,8
Touring	11,8	15,2	11,1	13,5	6,2
City trip	3,8	4,9	3,4	4,5	1,5
Other	3,0	2,9	1,8	2,5	—
Total	60,3	75,1	55,3	65,5	31,4

respondents, it was their first visit to the area. On the other hand, the percentage of repeat visitors among local people and those visitors living in other parts of the country is relatively high. More than 70% of the foreign visitors had never been to this area before. Of the respondents who had visited previously, 67% had done so between 1 and 3 times and 26% between 4 and 10 times. First time visitors had a stronger desire to learn new things and to discover the culture. Repeat visitors were more eager to be entertained. Among all visitors (locals, rest of the country and foreign visitors), the level of motivation to learn new things, to learn about the culture, to be entertained, to experience the atmosphere or take part in sightseeing declines with each repeat visit.

Images of the area

On average, a visitors image of the destination varies between 2.79 and 3.88 in a scale from 1-5, measured using a series of 12 attributes (Table 5). The average rate of the "global image of the area" increases by the number of repeat visits. Some visitors needed to revisit the destination in order to establish a clear image of the area. The image most identified with the area is an authentic sight, attaining an average score of 3.75. The lowest average rate is given to festivals and events. It seems that there is lack of these two types of activities.

Table 5 | Destination image (scale 1-5)

Destination image	Mean	Std. desviation
A fashionable place to be	2.77	1.191
Multicultural region	2.94	1.045
Culturally distinct region	3.39	1.164
Linguistic diversity	3.08	1.126
Lively atmosphere	3.34	1.052
Hospitable local people	3.95	0.979
Regional gastronomy	3.58	1.138
Customs and traditions	3.28	1.114
Festivals and events	2.69	1.185
Museums and cultural attractions	3.33	1.071
Historical architecture	3.85	1.048
Authentic sights	3.88	1.015

Tourists from other areas of the country associate the image of the area to authentic sights, historical architecture and hospitable local people. The lowest rate given from the possible image attributes is "a fashionable place to be". Tourists from abroad characterize the area as being very hospitable, having great historical architecture and authentic sights. Less appreciated is the lack of festivals and events. As previously mentioned, the average rate given to the image attributes by repeat visitors is higher than first time visitors. Foreign tourists did not consider the area as a fashionable place to be. Repeat visitors were of the same opinion, that local attractions and events simply are not attractive enough. Possibly the lack of creativity in entertainment linked to cultural attractions is turning tourists away.

3.5. Travel and booking arrangements

Many tourists did not book anything in advance, either transport or accommodation (30%). Another 17% of respondents declared that they made their own travel arrangements and 18% booked their accommodation separately. Only 15% of respondents were on all inclusive packages, mostly by tourists aged 50 years or older and on a cultural or touring holiday. Visitors were mostly independent travellers, choosing not to book in advance and seeking to do a bit of exploring in the destination. Those making their own travel arrangements, increasingly consult the internet. Transportation booked via internet is the most common type of booking by touring holidays (16%), city trips (13%) and sun/beach holidays (13,1%). Accommodation booking via travel agent or tour operator is the most common among visitors taking city trips. There is a relation between household income and the type of booking used. Tourists with higher income are more likely to book all-inclusive packages than those visitors with a low household income.

3.6. Sources of information

The type of information sources consulted before arriving at the destination is mainly family and friends (38,3%), guide books (32,5%), internet (28,2%) and previous visit (17,1%). Travel agencies and tour operators play a minor role in terms of sources of information, with 8,3% and 5,2% respectively. The use of travel agencies and tour operators as bookings agents are getting less common. The sources of information least solicited are television and radio, with only 3% of respondents claiming to obtain information about the destination or any kind of event. After arriving, the most commonly used information sources are tourist information centres (32,1%), guide books (30,9%), family and friends (24,3%) and local brochures (21,4%). After arriving, the use of internet becomes even less important, as well as tour operators, newspapers/magazines or television/radio. Guide books are quite popular with foreign tourists upon arrival.

3.7. Transportation mode

The forms of transportation most used to travel are essentially own car (50%), followed by plane (20,7%), car rental (16,4%) and coach (13,6%). Other forms of transportation have little use. To obtain a more clear view regarding the transportation mode used by visitors, an analysis will be conducted according to the visitors´ origin (current place of residence).

Transport mode used according to the visitors' origin

Travelling by plane is most common among foreign visitors, mostly due to the distance between the two destinations. Foreign visitors represent 94% of this mode of travel. It is obvious that foreign visitors make use of more that one type of transportation mode. Foreign visitors are highly dependent on the "fly and drive" concept to visit Portugal. The biggest percentage of visitors using own car is represented by foreigners (48,4%). Visitors coming from other areas of the country use their own car (40%), coach (27,1%) and motorcycle (26,7%). Local residents give preference to bicycle (27,3%), walking (24,1%), motorcycle (13,3%) and local transport (10,2%).

Transport mode used among foreign visitors

27% of foreign visitors travel with their own car, 18,8% travel by plane, 14% hire a car and 9,3% use coaches. German and UK visitors travel mostly by plane, each with a 20% share of all air travel, followed by the French (16,6%) and the Dutch (7,6%). German and UK visitors are also the most frequent users of hired cars, each comprising 15% of all respondents. Next were the French (14,8%). Of all foreign respondents using other modes of transport, by coach was 30,4% Spanish, 20,2% French and 11,5% British visitors. By train were British (13%), French (12%) and visitors from Germany, Spain and USA combining 10,2%. Walking was a preference of UK visitors (25,3%), followed by visitors from Germany (18,1%), France (9,6%), Luxembourg (7,2%) and The Netherlands (7,2%). Local transportation, like the bus and taxi was used mostly by visitors coming from the UK (19%), Germany (15,1%), France (10,1%) and Spain (6,7%).

3.8. Type of accommodation

As predictable, the most common type of accommodation is the hotel (36,8%), followed by caravan/tent (10,4%) and family and friends house (9,7%), closely followed by bed and breakfast (7,9%), own home (5,9%) and self-catering (5,7%). Table 6 shows what percentage of each type of accommodation was used by each source market. For example, of all respondents who affirmed having stayed in their own home, 58% were French. Of all respondents who claimed to use a second residence, nearly 48% were also French. This figure suggests, what was argued earlier, that there is a heavy influence of Portuguese migrants in what has been labelled the "French" visitor.

Table 6 | Type of accommodation according to visitors' origin

Type of accommodation	% of foreign visitors								
	France	Spain	UK	Germany	USA	Brazil	Portugal	Netherlands	Italy
Own home	58,0	8,0	—	—	—	—	—	—	—
Second residence	47,6	—	—	16,7	—	—	9,5	—	—
Hotel	16,7	24,7	13,3	12,9	—	—	—	—	—
Self catering	13,9	—	24,3	20,1	—	—	—	14,6	—
Bed and breakfast	12,3	—	8,4	7,1	—	—	—	—	9,7
Caravan/tent	24,4	25,1	—	12,9	—	—	8,5	—	—
Family and friends	29,5	15,5	—	—	—	8,2	10,9	—	—
Youth hostel	18,3	—	11,7	13,3	13,3	—	—	—	—
Other	23,0	24,0	7,9	—	—	—	12,9	—	—

Type of accommodation according to visitors' occupation

Considering the visitors´ occupation group with the choice of accommodation, the majority of respondents classified as professionals chose hotels, followed by bed and breakfast and self catering. Surprisingly, 31,4% of respondents who chose the youth hostels are also professionals. This fact causes a bit of confusion as youth hostels are one of the least expensive forms of accommodation and does not offer much comfort or additional services and facilities. The other types of accommodation – own home, second residence, family and friends house, caravan and tent – are more common amongst visitors in the occupation groups of technical professions, services and sales.

Type of accommodation according to holiday type

The type of accommodation chosen by visitor's can also be influenced by the type of holiday. As shown earlier, the most commonly used type of accommodation among the different holidaymakers is the hotel. Of all respondents claiming to use the hotel, 17,5% are on a cultural holiday, 10,5 % on a touring holiday, 6,7% on a sun/beach holiday and 3,6% are on city trips. Own home, second residence, self-catering and caravan/tent are most frequently used by tourists having a sun/beach holiday.

Type of accommodation and booking mode

Concerning the arrangements of accommodation, most respondents booking all-inclusive package opted for the hotel. Visitors who booked the accommodation separately either made no other reservations in advance or made their own travel arrangement directly. In addition, part of the respondents using other types of accommodation – own home (79,3%), second residence (76,6%), bed and breakfast (48,8%), caravan and tent (82,2%), family and friends (74,5%), youth hostel (50,6%) and other (71,8%) – also did not book anything in advance. In other instances, part of the respondents who booked their accommodation in hotels (33,8%), self catering accommodation (44,4%), bed and breakfast (39,2%) and youth hostel (34,2%) did their booking directly, mostly through the use of telephone/fax. Internet booking was most common among visitors booking hotels, bed and breakfast and self-catering units. However, the number of these respondents was relatively low.

3.9. Length of stay

The length of stay among visitors varies between 0 and 180 days. To present a better view of the responses, the length of stay was divided into five different groups, varying between the following number of nights: 0-3, 4-7, 8-15, 16-30 and 31-180. Nearly half of respondents (47,9%) stayed at the destination between 0 and 3 days. Next, 20% declared that their length of stay varied between 4 and 7 days. Only 13% of respondents stayed between 8 and 15 days. The remaining 2,7% stayed more than 15 and less than 180 days.

Length of stay according to visitors' origin

The number of nights spent by visitors varied according to the current place of residence. Table 7 gives a short overview of the breakdown.

Table 7 | Number of nights spent at destination by current place of residence

Current place of residence	Number of nights (%)*				
	0-3	4-7	8-15	16-30	31-180
Local area	36,0	28,0	16,0	12,0	8,0
Rest of the country	67,2	19,4	11,2	2,0	0,3
Abroad	53,9	25,1	17,6	2,6	0,8

* Based on total respondents.

Length of stay according to visitors' country of origin

In Table 8, countries with more than 100 responses are presented, according to the percentage of visitors by number of nights.

Table 8 | Number of nights spent at destination by country of origin

Country of origin	Number of nights (%)					% total responses
	0-3	4-7	8-15	16-30	31-180	
France	47,6	23,5	16,6	3,8	1,5	92,9
Germany	35,9	25,6	31,6	3,4	—	96,6
Portugal	50,6	12,2	7,8	—	—	70,6
Spain	70,4	18,5	4,3	—	0,2	93,3
UK	29,5	39,3	28,2	1,3	0,4	98,7
USA	73,1	14,4	7,7	—	1,0	96,2

Visitors from Germany, The Netherlands and the UK tend to stay longer, varying between 7 and 15 days. Fewer people are taking a longer annual holiday opting for shorter and more holidays during the year. This is reinforced by the increasing number of repeat visits. Taking weekend breaks or short breaks allows visitors sufficient time to explore the region, gather knowledge about local culture or enjoy the sun/beach – more times during the year. As mentioned earlier, 27,6% of foreign visitors were paying their first visit to the area. It is possible that not being familiar with the area leads visitors to spend less time on their first visit. Another explanation may be the type of holiday foreign visitors take – 27,4% cultural, 18,6% sun/beach and 17,2% touring.

Length of stay according to attractions visited

After presenting the relation between the different types of holidays taken by visitors and the time spent at the destination, a further relation was established between attractions visited and length of stay. Actually, the length of stay differs between those visiting attractions related to traditional culture and popular culture. Approximately 50% of visitors to traditional cultural attractions, such as museums, monuments, art galleries, religious and historical sites, theatres and heritage/craft centres stay between 0 and 3 days. On the other hand, 35-45% of visitors attending pop concerts, world music events, classical music events and dance events stay longer, between 4 and 7 days.

3.10. Expenditure

Table 9 presents an overview of a visitor's average expenditure by different party sizes. On average, the highest expenses were for accommodation and travel purposes, each with 264 Euro. Less is spent on admissions to attractions or events, averaging 56 Euro.

Visitors travelling with another person (partner or friend) spent the most money per person during the visit, compared to visitors who travel in groups (big or small) who spent less. Groups, either families or tours, use own car, bus and/or coaches as the transportation mode. Economic forms of transportation, keeps costs down. Admissions to attractions are also relatively low depending on the party size. Possible reasons include that group's benefit from discounts.

Table 9 | Expenditure according to party size

Expenditure (Euros)	Party size				
	Travel alone	Travel along one person	Travel along 2-5 persons	Travel along 6 or more persons	Average expenditure
Travel	141.86	300.53	259.91	358.53	264.07
Accommodation	128.36	265.55	308.36	405.65	264.04
Food and drink	109.09	211.01	211.04	581.82	208.90
Shopping	127.63	119.10	155.29	161.88	132.93
Attractions admissions	65.00	48.36	60.85	92.92	56.35
Total expenditure	527.55	945.86	1 077.94	2 180.89	955.63

3.11. Satisfaction with the visit experience

The average level of satisfaction among foreign and national visitors does not differ. In a scale from 1-10, the average satisfaction rate given by respondents is 7,92 which is rather high. The most frequent value given by respondents is 8. The majority of respondent is satisfied with their visit to the area. More than 14% were very satisfied, compared to 0,2% who claimed to be very unsatisfied. Another 5,6% were less satisfied and gave a rate between 2 and 5.

Table 10 | Satisfaction with the visit experience

Level of satisfation	Percent %
Very unsatisfied	0,2
2	0,4
3	0,5
4	1,1
5	3,6
6	6,6
7	19,5
8	33,1
9	18,1
Very satisfied	13,9
Mean	7,92

3.12. Most suitable cities for cultural holiday

Analysing the most popular cultural cities by world region we can conclude that Paris is considered the most popular city, with 51,8%. In the top five, Paris is followed by Rome (42,8%), Florence (36,9%), London (32,1%) and Barcelona (32%). After the top five comes Lisbon (30,1%), Athens (28,5%), Venice (28,4%), Madrid (22,3%) and Prague (21,5%).

4. Discussion

When looking at visitor's profile, surprisingly, the main age group falls between the ages 20 and 49, which reveals quite young and active people. Not surprisingly, however, is the relatively high level of education, which is consistent with previous research. Visitors tend to have professional or managerial occupations and relatively high income.

There are more visits with friends and family, and greater intergenerational travel. Family and friends also play a significant role as the main information sources. The main transport used is essentially their own car, even amongst foreigners who usually prefer air and drive programs.

Hotels are the most common type of accommodation, particularly for professionals, followed by caravan/tent. A significant number of tourists that chose youth hostels (one of the least expensive and also least comfortable types of accommodation) are also professionals. This might suggest a shift in visitor's choices and preferences as well as the concept of quality and comfort.

French visitors are particularly outstanding as the group that stays more often at own home and second residence. This fact suggests there is a heavy influence of Portuguese migrants in this group.

Visitors are mainly independent travellers. Only a small percentage was on all-inclusive packages, mostly elderly tourists (aged 50 years or older) and on a cultural or touring holiday. Tourists with higher income are more likely to book all inclusive packages than those visitors with a low household income. As for the type of holidays, only 35% of respondents considered being on cultural holidays, although they were all visiting cultural attractions or attending cultural events. Cultural tourists are mainly foreigners, particularly French and Spanish. This emphasizes the fact that culture is an important attraction for all kinds of visitors even those motivated by sun/beach holidays.

Although Richards (2001) identified museums as the main cultural attraction in Europe, in this particular case monuments represent the most visited cultural attractions, followed by historical sites. Museums held the third position of preferences. Craft centres are one of the least visited attractions.

There is a high percentage of first time visitors (27,6%) and the majority stayed at the destination up to 3 days. It is possible that not being familiar with the area, people tend to spend less time on their first visit. However, a significant result is that visitors attending events (world music, classical music and dance events) stay more time (4-7 days) than visitors attending traditional cultural attractions (museums, monuments, art galleries).

The relatively high percentage of first time visitors, suggest a tendency for more trips to smaller and undiscovered destinations within Europe. The trend seems to include shorter, more frequent gateways and more last minute booking.

Global image is positive amongst tourists in general, and increases by the number of repeat visits. Some visitors needed to revisit the area in order to establish a clearer image of the area.

Cultural attractions in general are not considered a "fashionable place to be", particularly by foreign tourists. What seems to be a contradiction is that repeat visitors were of the same opinion. Even though they have returned to the destination, they consider that local attractions and events are not attractive enough. Possibly the lack of creativity in entertainment linked to cultural attractions is turning tourists away.

The overall impression of Portugal as a tourism destination is very positive, and Lisbon comes as sixth at the top 10 most popular cities as tourism destinations.

5. Practical implications

Research shows that culture is an important motive for visiting Portugal. However, visitors are not a homogeneous group and the form of culture consumption also differs. Cultural attractions seem to be of significant importance for different kinds of tourists and not only for those motivated for cultural holidays per se.

Cultural attractions are not considered as fashionable enough, to attract people for longer periods or to repeat visits. It might be best to consider them as an important complement for other types of tourism. This suggests that the strategy should be of diversification rather than specialisation of cultural tourism destinations. Some destinations might not have the necessary means for specialisation and that seems to be the case for Portugal.

Although the length of stay is generally quite short, a significant result is that visitors attending festivals/events (world music, classical music and dance events) stay more time than visitors attending traditional cultural attractions (museums, monuments, art galleries). There seems to be an opportunity for the development of such events, particularly because entertainment was acknowledged as insufficient by all age groups. This is also in line with research (Richards and Wilson, 2005) that stresses the need for creative shows, spaces and experiences, linking traditional cultural products, services and heritage with creative industries such as entertainment, design and architecture in order to provide great advantages in increasing visitor numbers and length of stay. Creativity and innovation are essential for maintaining a place on the cultural tourism map and for attracting repeat visitors due to the increasing competition by tourist destinations.

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