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## IN WHICH BOAT AM I GOING? The case of the tour at Ilha da Restinga

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### Abstract

**Objective of the study:** to provide a discussion on marketing decisions, in an ecotourism context, with the product being a trip to Ilha da Restinga.

**Methodology/approach:** the case was built based on interviews with the protagonists and participant observation during visits to Ilha da Restinga, in addition to documentary analysis.

**Main results:** the case raises a debate based on the dilemma presented, which questions the possibility of maintaining the trip to Ilha da Restinga through the results of the management actions of the protagonists, especially regarding to marketing decisions in ecotourism contexts, favoring a reflection on possible management improvements.

**Theoretical/methodological contributions:** the teaching case provides the use of this pedagogical resource primarily in disciplines of Marketing, Tourism Marketing and Entrepreneurial Administration, preferably in Administration and Tourism.

**Relevance/originality:** this teaching case is relevant because explores the organizational practices of managers of an island that is aligned with the perspective of ecotourism.

**Social/Management contributions:** the case can be used to help managers understand possible avenues for tourism organizations that are based on the ecotourism, as well as providing a broader view of marketing decisions for students when applied in the classroom, which is important for this type of organization. Thus, it contributes to the learning and development of skills related to strategic marketing decisions, specifically based on the precepts of ecotourism, which presupposes the appreciation of the environment and the local culture preservation and positive impact for the various stakeholders.

**Keywords:** Marketing. Ecotourism. Ilha da Restinga.

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## 1 INTRODUCTION

The Limeira's - Evelina, Pedro and Yuri - knew that the Ilha da Restinga, considered by them as a true source of knowledge and inspiration, has much to teach, as it is part of the History of Paraíba and Brazil, with a peculiar geography, its home to several biomes and ecosystems, in addition to being protected by law. With all these attributes, the Limeira's wish was to share this heritage with other people. For this reason, they insisted for five years for the tour to become financially viable. Then, when the opportunity to receive students and tourists on the island arose, they embraced the project, which ended up becoming a business possibility.

However, at the end of another tour, that afternoon in January 2018, Yuri, his mother Evelina and his uncle Pedro could no longer deny the obvious problem that they had been putting aside for so long. Evelina was the first to speak:

- Yuri, is it really worth keeping the tours going? The cost is high, the physical effort is great, me and your uncle are not getting anything for this ...

- Mom, don't you think we can still have a greater flow of trips that can compensate for all our effort and take a salary for you and Uncle Pedro with a greater amount of visitors? - Yuri said.

- Five years have passed and you know that our demand is very seasonal, I no longer know how we can maintain our standard without increasing the number of visitors. We have not readjusted the price that we charge on the tour for longer than we could, as many visitors do not want to pay it even with everything included, even lunch - Pedro emphasized.

- This is a fact! We haven't readjusted the amount charged in three years and most visitors only value the tour when they get on the island; however, to convince them to visit us is still complicated. The publicity of the tour still reaches few people; is that what is not working in our management? What else can we do besides partnerships with travel agencies? - Yuri thought aloud, wondering about that answer.

Yuri knew that partnerships with tourism agencies were not enough, due to the demands they made. He also wondered if the problem was the lack of exclusive dedication, as the trip to Ilha da Restinga was not the main activity of the family. Yuri knew that they still had no answers as to what their next step should be, whether to



end activities or insist on its maintenance, but he knew that it was past time to make a final decision on the destiny of the tour to Ilha da Restinga.

## **2 FROM FAMILY WELL TO FAMILY BUSINESS**

Ilha da Restinga is located at the mouth of the Paraíba River, in the city of Cabedelo, in the state of Paraíba, and is between the cities of Santa Rita, Bayeux, Lucena and João Pessoa. It has about 1457.92 acres and the land's elevation reaches eleven meters in height. After the Portuguese's invasions, in 1579, a small wooden fort was built at the behest of the monarch Dom Pedro II, who considered this island a strategic place for the defense of Paraíba, precisely because it is located at the mouth, that is, at the meeting of the river with the sea, which was the entrance to the colonized territory.

Centuries have passed, much war has taken place, many Portuguese, French and Dutch fought over the Island, the natives did not get along and had to leave, and it ended up in the hands of a monastery. The so-called Ilha dos Frades de São Bento (Saints Benedict Friars Island), has been experiencing difficulties ever since, and in 1969, Mr. Luiz Limeira, a merchant and philanthropist, together with his wife Francisca, bought the island from this monastery. Thus, the Ilha dos Frades de São Bento came to be called Ilha da Restinga and to be a private property.

Mr. Luiz's intention was to subdivide the place and sell the land, which he did, however, due to the difficulty of access, no buyer claimed the land and it was used only for family entertainment for decades until after his death. Limeira's 14 children and 30 grandchildren grew up going to Ilha da Restinga every weekend. After the death of the family patriarch and with the growth and development of children and grandchildren, the frequency of visits decreased, but didn't stop.

Pedro Limeira, one of Mr. Luiz's 14 children, also grew up on Ilha da Restinga, surrounded by nature. After several unfinished university courses, he found himself in the field of biology and became a professor with an emphasis on tropical botany. As a State teacher, after years of teaching, he decided to innovate in his teaching, by taking his students to a field class, which started to take place at Ilha da Restinga, starting in 2009. On his own, often paying out of his own pocket, when students could not contribute, biology and environmental education classes were held there, a discipline that was not in the curriculum, but that he still taught, due to its importance.



Evelina, lawyer and building technician, also a public servant, joined her brother Pedro in the tours that became more frequent at that time, as she thought that Ilha da Restinga needed special attention and more visitors, as the family started to go less after the death of the patriarch. Her intention was to let people know that this was a private property and, as a good lawyer, she needed protection from the responsibilities of what happened inside, since it is the responsibility of the owners what happens on private property.

After a while, in 2011, Evelina received a call that brought the brothers an opportunity to increase the flow of people and make the tour to the island a profitable business:

- Hello, please, can I speak with Ms. Evelina?

- Yes, may I help?

- Ms. Evelina, my name is David and I own a boat that serves tourists at Praia do Jacaré and would like to know if I can take some tourists to Ilha da Restinga next weekend.

- Oh, well ... David, we don't actually accept tourists, only students, because it's just me and my brother. The island has no electricity or drinking water, making things a bit more complicated.

- But Evelina, it is such a beautiful place ... everyone who passes by the Island on my tour wants to know the place! Let's make one test, it costs nothing and you can still profit a little from it. You can even sell some water.

- I need to talk to my brother first and then I will return with the answer, will you?

- Deal! I'm waiting.

Pedro, fearless as always, decided to accept the challenge and be there on the day that tourists would visit, after all they would certainly have curiosities about the place and no one knew Ilha da Restinga like him. Even full of fears, his sister Evelina also decided to accept the opportunity, and so she returned to David with the positive response and many expectations.

- Hello David? We decided to receive tourists! How would we do it?

- Well, I can arrive with them at 8 on the Island, can I? I'm taking 15 tourists and I thought I'd pay you twenty reais per person, how about that?

- All right! We'll be there waiting!



On the appointed day, Pedro and Evelina arrived early to decorate the place with rustic fabrics and artifacts. They took bottled water to sell. After the tourists arrived, they were welcomed and there was that moment of silence, as the tourists wanted to know more and explore, but Pedro and Evelina didn't know much about what to do, after all, they had never received tourists before. Did they want a biology class? Environmental Education? Did they want to do the ecological trail? Or just stay in the welcoming area enjoying the moment? Someone asked if the island had a trail and that saved the occasion. They went there.

Pedro, used to take nine or ten years old students, entered the trail with the tourists at 9 am. He got excited and forgot that it was summer, that it was hot and that people had gone for a tourist experience. He returned at 11:30 am, with tourists tired, hungry and overheated. There were complaints about the time of the trail, they asked if there was lunch at the place, which they didn't have; they asked if they would have other activities, and they also did not, and it was clear that they wanted the brothers to have more to offer. However, Pedro and Evelina simply did not know how to do more than that. Therefore, the option was to go to lunch elsewhere, with more structure

From the tour, they received R\$ 300.00, of which they paid for the speedboat's fuel and the fabric used in the decoration. Then there was R\$ 225.00 left, so  $\frac{1}{4}$  of the revenue was of direct cost. Pedro and Evelina did not put the cost of their work, or *pro labore*. The remaining money only helped on the caretaker's payment. If the objective was to make money and to pay fixed costs, and also to make the tour a viable business, it was necessary to do much more than what was done that day.

### 3 WHAT STRUCTURE IS THAT?

From the experience with these tourists, a hobby became a potential business, but there were many issues involved, as they were two of 14 brothers, with little knowledge of management, who together decided to receive tourists and transform a natural sanctuary into a place for ecotourism and environmental education. In addition, they thought about land taxes, which were very high; in the employee, who needed payment; and the fact that this is an opportunity to help pay the local fixed bills.

They decided to invite Yuri, Evelina's eldest son and Pedro's nephew, who was a business student, to participate in the whole creation of the business and take part in the decisions, since he had skills in service and logistics, in addition to having the



license to maneuver the vessel. Yuri, who also grew up going to the Island every weekend, not only accepted the challenge, but celebrated the fact that they could make this tour a means of sharing knowledge and helping the livelihood of some involved who would become partners of the family in this endeavor.

In addition to Yuri, Pedro and Evelina hired Maria Caetano, wife of caretaker Magão, to run the kitchen, and Maria Inês, for the kitchen assistant. All three worked only when there were tours, which means that they were paid by event. Also, when groups preferred to take the tour in a kind of canoe instead of a speedboat, the Limeira's hired, on average, four canoeists for the route, depending on the size of the group. Yuri received 20% of the total revenue from the tour, the Marias received daily, regardless of how many people attended, and the canoeists received a fixed amount per tour, which monetarily represented a full day of work for them. Magão, as an employee, received a monthly minimum wage and, together with his wife Maria, lived on the island. In this way, they began to receive tourists and students in groups with between 10 and 50 people, but still without the receptive and feeding structure suitable for both.

With that, when the tours started to become more frequent and the tourists more demanding, in 2012, investments needed to be made. The first decision was about the structure that existed on the Island, which was very precarious. There was no power and no running water, but there was well water and a power generator if needed.

There was a wooden pier that had been built, but which was not safe and offered risk to anyone who would disembark at the site. With that, the first investment was the construction of a floating dock. The pier was inspired by those of large marinas, which have a kind of raft that follows the height of the tide flow, since the new construction had to withstand all the conditions of the local nature and be resistant to salt water.

In order to lower the cost of construction and make it of low environmental impact, the Limeira's decided to build the pillars with reinforced concrete covered with PVC pipes. With this, the life of the construction would be increased and the exchange of material to maintain the structure would be almost zero. The rest of the wood was selected at demolition stores and at sites that were being demolished. As hardwood was needed, the research was long, but they got almost 70% of the material needed to build the rest of the pier.





The second stage of investment was to improve the structure of the hut that served as a receptive for visitors. In this hut the main explanations about the place were made, as well as the service of meals. For this reason, it was necessary to change the straw cover of coconut palms for a tile cover; the floor was built to replace the sandy floor and make the place more accessible for people with reduced mobility.

Once again it was necessary to reinforce the structure of the place to receive the weight of the tiles, then masonry pillars and beams were built, and all material such as rafters and tiles was again for demolition. Minor repairs were also carried out in the bathrooms and kitchen. It should also be said that with each reform, wheelchair accessibility was applied until the structure was completely accessible in the receptive area. In addition, to better welcome those who visited the site, a “hammock place” was built, an environment with hammocks and maritime-style decor.

On the island there was a house that had been built in 2014, which served as accommodation for possible overnight stays for visitors and tourists and also for the personal benefit of the Limeira´s. For the house, solar panels and electrical wiring, ceramics, tiles for bathrooms, and cement were purchased brand new. Everything else, such as bricks, tiles, wood for structure, kitchen sinks and laundry area, windows, doors, beds, dressers, tables, cupboards were renovated or were products of the transformation of demolition wood. This construction came to be called by the Limeira´s as the "Green House" (Casa Verde).

These investments were made with the aim of making the Island a place with an adequate structure for visits, driven by the perspective of the tours, and occurred in 2015, all financed with Evelina's own resources. Some brothers helped, but she invested most of the value. Also, over the years, minor renovations and repairs were being carried out by Evelina and Pedro, as they realized that further improvements were needed on the Island. This usually happened when they returned from a trip on which, as tourists, they identified the needs.

These expenses were not accounted for as part of the business or as costs that should be “covered” by the sale of the tours, since each one paid what was possible, in the way they could and loans were not necessary for these reforms; it was all financed with “own money”. So, in 2013, once the space was redesigned and suitable for visitations, it was time to decide how the tours with this new structure would be.



#### 4 ILHA DA RESTINGA GROWS

The Limeira's, brothers and nephew, used the knowledge they acquired on trips around Brazil and abroad to also improve the way of offering the tour on Ilha da Restinga. Despite belonging to that place where they grew up, they soon saw, after the first tourist experience, that it was necessary to think about how they would like to be received if they were tourists. In addition, it was important to consider how they would exploit the island's tourism potential, which should be aligned with the family values that they shared. They decided that they would invest in Ecotourism.

Yuri, who had done an internship at SEBRAE (Brazilian Micro and Small Business Support Service) and was part of the organization of Territorial Development courses, identified that the Limeira's already carried out actions to develop the Island, in Cabedelo. As a result, they began to highlight these actions for visitors, as a way of showing that the service also contributed to the tourism production chain, and gave priority to the tourist sites available in the city, to stimulate the local economy.

In addition to becoming a tourist destination in the city of Cabedelo, Ilha da Restinga started to be a reference in local gastronomy. Through the differential in the way to cook dishes made on a wood stove and clay pots, visitors expected a lot. For the most interested and curious, a cooking tour was offered and the chefs, the two Marias, residents of Cabedelo, added a hint of interest when sharing some recipe secrets, to the delight of those who were seeing it all for the first time. Some people were invited to learn how to make homemade coconut candy, making the regional experience even more striking. Comments from tourists and visitors were not uncommon, they said that the place was capable of providing peace of mind, as well as reminding them of good times in life, with the smells and flavors that came from the kitchen.

In this sense, the lunch ingredients stood out, since they were all bought fresh, in street markets, also located in the city of Cabedelo; and the shellfish, served at lunch, was collected in the region, by one of the Marias, and which was bought by Ilha da Restinga itself. Some leaves, for the salads, and even the mint, added to the pineapple juice, came from the island's garden, as did the coconut milk, made from the coconuts grown there, which guaranteed the quality and freshness of the products used in that cuisine.





When serving, the Limeira's insisted on placing pots and clay dishes on the table, due to their quality and their adjustment to the wood-kitchen proposal (the pots resisted the fire and did not break like the others), which they were bought from a ceramist, who lives in the countryside of the state of Paraíba. As a consequence, some people began to ask about them, asking who made them, and after that, the Limeira's started to order a few more pots, to sell them in Ilha da Restinga.

The concern with the waste resulting from the visits was another differential of local's managers. The dry garbage was taken back to the mainland and sent to recycling centers, while the wet garbage became food for pigs or compost for the vegetable garden grown on the Island.

With this format, the tour was sold by the Limeira's, as well as by guides, agencies and tour operators from all over Brazil. To sign these partnerships, Evelina and Yuri visited these agencies and the representatives of the operators, showing the location, through pictures, the services offered and indicating different prices: the tour guide was offered a 10% discount; to tourism agencies, 12%; while, for operators, a discount of up to 22% was given, given the promise of a greater number of visitors. An advertising agency was hired to prepare the Ilha pamphlet (Appendix 1), made with recycled paper, which could also be used digitally.

For these partners, the objective of the tour to Ilha da Restinga was also presented, in order to encourage the construction of values, habits and attitudes important for environmental preservation, both in visitors and in local communities involved with the activity. Over the years, the Limeira's met a good number of people who had never gone to a dense forest or even entered a boat; therefore, the team took great care of the place. Everything was thought and planned so that the impact on the Atlantic forest was minimal. Pedro, the biologist, prepared two alternative trails, in addition to the main one, for forest recovery.

The tour took on a conventional schedule: after the group's arrival, an explanation of the island's history was given, at "Terraço Dona Chiquinha", to highlight its role in the history of Paraíba; subsequently, visitors were directed to the ecological trail, where Pedro Limeira, guide to the island, explained about the local fauna and flora, also taught environmental education (to stimulate ecological thinking) and addressed the geography of the region. He emphasized the value of interdisciplinarity, ethics and



sustainable development, observing aspects of ecosystems, as well as the historical and geographical relevance of the Island.

For lunch, made on site, while the visitors were making the trail, the two Marias selected the ingredients personally and did not add any industrialized flavoring in the preparation of the food; all food was natural based. After the trail, visitors were served with lunch at “Terraço Dona Chiquinha”, an environment to comfortably serve up to 50 people. Afterwards, visitors were invited to visit “Green House”, which illustrated, in a tangible way, the possibility of building in a sustainable way, which could also foster ecological thinking among tourists.

However, even with an agreed schedule as the main one (Appendix 2), the Limeira’s made changes when offering activities, according to the objective, age, level of education, climatic conditions and length of stay of the groups on the Island. This happened during a visit by a group from the Instituto dos Cegos da Paraíba (Paraíba Institute of the Blind), which had the entire program of the tour adapted, with the purpose of promoting a sensory experience compatible with the needs presented by the visitors. When the adaptation was only dynamic, the value remained the same as the conventional package: in 2013, the price was R\$ 80.00 per person; in 2015, the value was updated to R\$ 120.00; and so it remained. This was a problem, since the values did not cover costs previously, in 2018, the gap became even greater.

Other events had a personalized value, such as the fraternization of the executives of the top management of a large mining company in Paraíba, in which a list of drinks, possible snacks and dishes was presented for selection of contractors, to be served and provided, subsequently with the respective budget. That same mining company later decided to provide rescue training in a forest environment for its rescue team, and contacted the Limeira’s again, to prepare a reception, including overnight, food and transportation, for three days, each week, completing the training of the four teams, at the end of the month.

In addition to tourist activities, Ilha da Restinga was also a location for filming and for holding local events, such as moonlight parties, with musical performances and local cuisine. However, even with all the investments in the structure, the Limeira's concern in promoting Ecotourism and adapting the tours to the varied expectations, and the basis of their business being the promotion of the local production chain, the demand for tours to Ilha da Restinga was not enough.



In 2018, five years were completed without the tour being able to promote sustainability as a business, since the gains barely covered the costs, and, in addition to the team's payment, there was no financial return for Evelina and Pedro, who also worked on the island, there were no resources left for the maintenance reinvestments required by time. So, what to do to change this situation?

## **5 ARE WE GOING TO TAKE THE TOUR TO ILHA DA RESTINGA, OR NOT?**

Strategically, the Limeira's sought information to help them plan and develop competitive advantages, thereby improving sustainable development, both as a business and as an agent for regional tourism. One of the initiatives was to travel, in 2015, to the city of Bonito, at the State of Mato Grosso do Sul, the most visited ecotourism destination in Brazil. When there, they noticed that the tours were similar to the ones they offered. In terms of value, a whole day in a place with various attractions and activities, also with transportation and food, except drinks, cost, per person, around R\$ 200.00, at that time. And the standards of structure and quality were similar to those offered on Ilha da Restinga.

Through this parameter, the Limeira's realized the need to reformulate the way of publicizing their activities, using social networks, in addition to the website itself, as advertising platforms. Soon, the first questions from potential customers began to emerge: what would I have to do on Ilha da Restinga, besides the trail? What water activities were offered? Most of the comments were from people who did not know the place, or the work done by the Limeira's, comparing the amount charged on this tour with other tours carried out in public environments, which had only symbolic entrance fees.

Comments on social media about the amount charged for the tour were a constant inconvenience for the team, including accusations that they would be practicing "marry sale" (a type of crime against consumers in Brazil, where the sale of one product is associated with the purchase of another), when referring to the tour with lunch included. Yuri himself replied, he adapted the responses to customers' demands: "if you don't want lunch, we can only charge for the tour, however, there is no sale of food on site"; or, "if you want a lunch without seafood, we can arrange it for you".

But, it was certain that the amount charged by the Limeira's could be considered below the tourist market, as Yuri always insisted on emphasizing to Evelina and Pedro,



because, in other tours along the coast of Paraiba, even higher values were charged, not including lunch, only transport to the destination. The tourist, in addition to paying for the tour, needed to pay for food, or even food for the tour guide, if he is with a small group.

Concerned, the Limeira's sought feedback from friends and other people, who used to go on ecotourism tours, about the price charged by them. They received responses, such as: "your value is great; I've been on other tours that don't include so many things, and the price is higher"; "Last month, I went to a beach in Pernambuco and paid R\$ 300.00 for a two-hour ride on an ATV, which didn't even include a glass of water!"

On numerous occasions, people reached through the digital networks of Ilha da Restinga, to seek more information, and were really interested. All detailed information for each stage of the tour was passed on: how lunch was served, what was included in the tour or not, but when people received the prices, people became discouraged.

The last episode was that of a company, which wanted to hold a corporate event, with lunch and transportation for 100 people and, for that, requested an offer. Yuri sent with the value of R\$ 120.00 per person, the event manager declined, arguing that the value was above what he expected. Not satisfied, Yuri called Evelina to talk:

- Mother, I think we are no longer able to reduce the amount charged. We should review our costs per tour, with a group of ten people, to be sure.

And so, they made a cost chart, to identify the price elaborated:

Costs for a group of 10 people	Value
Cookers	R\$ 300
Vessel fuel or canoeists	R\$ 150
Lunch Supplies	R\$ 400
Yuri's Commission	R\$ 240
Total	R\$ 970

- So, if we earn R\$ 1,200.00, to receive ten people, we have R\$ 110.00 left to pay for the maintenance of the boat, the caretaker, and the rent of the space for the boat to stay in the marina. Of course, we do not even include the high cost of land tax in this account. How are we going to maintain our quality and keep our commitments, when we are almost paying to receive people? Why don't visitors value our tour?

Another problematic issue involved the relationship with tourism agencies, who knew Ilha da Restinga and tried to sell the tour, but who did not commit themselves to



offering the conventional package, as few tourists preferred a less traditional tour. A clear example of this issue is that the buggy ride to the south coast of Paraíba, without food included, cost, in 2018, R\$ 90.00 per person. In addition to spending the day exposed to the sun, tourists need to pay for their food and the driver who takes them. Yuri thought that these were the types of tours that are viable to a tourism agency, that is, with low cost and high return.

Other local tourism practices also did not contribute to the development of activities, as some agencies, which sell mass tourism, wanted to purchase tours on the Island, and take their customers with more than 40% discount on the amount charged, with guarantee of exclusivity of the place, which meant that the island should receive tourists brought only by these agencies. More than that, the tour guides, in addition to the commission received for the tour, wanted a value per person, between two and three reais, to be passed on to them, “for having indicated the Island for the tour”. All of these issues made it difficult to prospect for potential tourists, and residents of the region showed no interest in going on the tour to Ilha da Restinga.

With all these issues in mind, one more tour ended, that January 2018, after the payment of all expenses, Evelina found again that the financial return was not enough. Therefore, she called Pedro and Yuri to talk and, frustrated, she got off her chest:

- Guys, the situation is untenable. This agency, for example, said it would only bring visitors if we only charged R\$ 80.00 per person! As if we already don't have a price below the market!

- And why did you accept the proposal? - Yuri asked.

- I preferred to accept, because it is better to have this money than none! But R\$ 4,000.00, in a tour for FIFTY people, is completely impractical! A group of this size takes a lot of effort and we end the day completely exhausted. Pedro and I did not earn anything, and there is still almost nothing left to cover the expenses with the Island. Everyone remained silent, and she continued:

- Well, I think we really need to decide on this tour. I don't know if we can take it anymore. Yuri, what do you think? Is there anything we can still do to change this situation? - Evelina asked.

Given the investments made and the scenario in which they found themselves, the Limeira's needed to decide what to do. What should be the fate of the Island? Was it time to end the tour? What could Yuri do to not lose all the emotional and financial





investment that his family made to make the trip to Ilha da Restinga a successful business?

## APPENDIX

### Appendix 1: front side of the flyer







### Appendix 1: back side of the flyer

**Transporte Aquático:** Percurso feito a partir da marina Big Toys\*, na praia do Jacaré.

**Trilha Ecológica:** Trilha principal com duração aproximada de 1:30h, guiada por um biólogo. Outras trilhas maiores ou menores a combinar.

**Almoço na Ilha:** Devido à capacidade limitada de atendimento, atenderemos prioritariamente através de reservas feitas por telefone ou pelo nosso site.

\*após a linha do trem da praia do jacaré, entrar na primeira rua à direita e seguir em frente. 150m depois da estação de trem é a entrada da marina num muro amarelo.

**Ilha da Restinga**  
CABEDELÔ • PARAIBA • BRASIL

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### Appendix 2: Conventional schedule

In a schematic manner, the tours followed the following schedule:

1. Departure from the Marina Big Toys boat, at Jacaré, at 9:30 am.
2. Arrival on the island and time to organize for the trail.
3. Trail guided by a biologist, in which there was a small lecture about the local fauna and flora and environmental education.
4. After the trail, a buffet-style lunch is served at the Dona Chiquinha Terrace, consisting of fried fish, shellfish stew, *pirão* (manioc flour thickened with the shellfish stew broth), rice and salad, including dessert (seasonal fruit jam).
5. Free time after lunch to ask questions about the place, socializing the group and local experience activities, such as making the fruit jam.
6. At 3 pm, the exhibition "Shall we talk about nature?"
7. Return at 4 pm.



## 6 TEACHING NOTES

### 6.1 EDUCATIONAL OBJECTIVES

The case addressed aims to request the student to analyze the marketing strategies used in the context of ecotourism, to be applied in disciplines in the areas of Marketing, Tourism Marketing and Entrepreneurial Administration, in the Administration and Tourism courses, preferably. The case, therefore, has an indication to be used in bachelor's degree courses, and can also be analyzed by postgraduate courses *lato sensu*.

We believe that, through the context of Ilha da Restinga, the case is a challenge for the student, who must indicate efficient marketing strategies so that the business can deliver value to potential consumers and society. Additionally, the business, which is based on the concept of ecotourism, provides opportunities for students to reflect on exchange relations, within this logic, and their impacts.

Thus, the case can contribute to the learning and development of skills related to strategic marketing decisions, specifically based on the precepts of ecotourism, which presupposes the preservation of the environment and local culture, as well as the appreciation of the positive impact for the multiple stakeholders. Also, because it is an ecotourism product, students can exercise the decision-making process on marketing strategies, with a view to valuing this type of product. Finally, we hope that students will be able to develop the skills of evaluating and developing marketing strategies for ecotourism organizations, understanding the particularities that must be identified, worked on and communicated efficiently to consumers and society, in order to improve performance of an organization.

### 6.2 DATA SOURCE

The teaching case portrays a real story, based mainly on the story of the protagonist Yuri. In addition, primary data were used, based on semi-structured interviews with those involved. Also, at the end of 2018, a visit was made to the site, together with Evelina and Pedro. As a source of secondary data, available public documents were used, such as government reports and SEBRAE booklets.



### 6.3 PEDAGOGICAL TOPICS

To operationalize the application of this teaching case, we suggest that the teacher:

1. make the material available for students to read and analyze the case in advance, requesting individual answers to the proposed questions;
2. previously emphasize the importance of presence and punctuality on the day scheduled for the activity, ensuring that it is indicated in the teaching plan, and that the date is available in the discipline's teaching calendar;
3. apply the activity in the classroom, separating students, according to the teacher criteria, into groups of four to six members;
4. ask the groups, in possession of the answered questions, to discuss the individual answers, and to form a single answer for each question, based on the group's discussions;
5. spend, with this step, a class, if the classes have a duration of 50 minutes; and move between the groups, observing the dynamics applied by the students, in order to identify which ones have difficulties with the activity;
6. start, after the discussion and the preparation of responses by groups, the discussion in plenary, choosing to undo the groups or keep them, as it deems most appropriate;;
7. encourage reflection on the dilemma, proposing to students to put themselves in the shoes of each of the entrepreneurs and employees, to then follow up the discussion on the questions that were answered.

We guide the teacher to try to stir up the debate, by indicating that certain students assume the speech, both at the beginning of the activity and during each of the stages. As the debate on the case can foster time-consuming discussions, it may be necessary for the teacher to set a time for each of the questions.

Thus, we suggest that the time for discussion in the plenary is between eight to ten minutes per question, so that it is possible for the teacher to make a closure, resuming the main points discussed in the activity. At that time, the suggested time is based on the 50-minute class. Finally, we believe that the activity can compose a student's evaluation grade, therefore, we indicate that a part of the grade is assigned



for the delivery of individual responses, and another part for participation in discussions, in small groups, and in plenary.

#### 6.4 DISCUSSION QUESTIONS

1. What is the relationship between the tour on Ilha da Restinga and ecotourism? Provide examples that illustrate your answer.
2. Consider the tour on Ilha da Restinga as a product, based on ecotourism. How do you evaluate the business, in terms of strategic marketing actions? What would you change?
3. In your conception, what elements of the marketing mix, developed by the Limeira's, would need to be improved? Given the information provided and with your knowledge on the subject, prepare an alternative proposal for the marketing mix for Ilha da Restinga.
4. Imagine that you are Yuri Limeira. What decision would you make about the tour on Ilha da Restinga? Consider the consequences if you decide to continue or terminate activities on the Island, justifying your decision.

#### 6.5 CASE ANALYSIS AND CONNECTION WITH THE LITERATURE

6.5.1 What is the relationship between the tour on Ilha da Restinga and ecotourism? Provide examples that illustrate your answer.

This question stimulates the student's ability to identify the aspects presented in the case that demonstrate their relationship with ecotourism. For that, Layrargues (2018) can be cited, which presents the environmental, cultural and economic aspects of ecotourism. In effect, the author reveals an estimated panorama for the segment, as the fastest growing in tourism, at a rate of 20% per year, moving around half a million tourists and approximately 500 million reais a year, in addition to creating about 30 thousand direct jobs.

It is important for the student to understand that ecotourism has come to represent much more than the tourist exploitation of natural resources; it has become a way of life, in much of the world (Dale, 2005). For this reason, this type of tourist is considered a protector of the visited environment, so that ecotourism should include environmental education for visitors in its itinerary. With this, the student needs to understand that this market niche is composed of environmentally aware people, who





seek contact with preserved natural environments, and act in a way to conserve the ecosystem, during visitation, to contribute to its sustainability (Ruschmann, 2000) .

In this perspective, students can recognize that ecotourism-based businesses reinforce culture, with values and traditions that identify a community, playing a role in preserving traditional communities and their cultures (Russo, 2010). Throughout the text, students will be able to identify elements that fit the island in this concept. Upon arrival on the island, visitors were welcomed with a short lecture, explaining the history of the place and how the island became private property. Another element is in the ecological trail, accompanied by the biologist, who talks about particularities of the local fauna and flora, always reinforcing measures to protect the environment and how the way of life impacts nature; and stimulating the spirit of environmental protection among visitors, by presenting data on the history and geography of Ilha da Restinga.

The role of local cuisine is part of ecotourism and is also understood as a cultural heritage (Lobo, 2018), it is another point that can be presented by students. There is an appreciation of culture and tradition in the cuisine of Ilha da Restinga, and lunch, based on what the community eats, was one of the highlights of the tour. Food made in a wood stove and in clay pots are elements that value local tradition. In addition, lunch ingredients were purchased from the community and extracted from the island itself, reinforcing ways to stimulate the local economy and to eat with awareness.

According to Lobo's research (2018), ecotourism destinations that have less cosmopolitan characteristics in their cultural and population formation, with stronger traditional cultural traits, such as the case of Northeast Brazil, try to present a better local cuisine to be enjoyed by tourists. In this case, we see that clay pots and dishes, made by an artisan living in the state, were used to serve lunch, causing curiosity about the typical dishes of the region. the Limeira's started selling pots and pans to visitors and, thus, contributed to cultural and economic development.

It is also possible to mention the fact that the island has ecotourism as an attraction, with an environmental and cultural focus, which promotes the learning experience for tourists (Richards & Marques, 2012). In this perspective, a tour of the kitchen was offered and the chefs, the two Marias, residents of the city of Cabedelo, added a hint of interest, by giving some secrets of the island's recipes to visitors. Some people were invited to learn how to make homemade coconut candy, making the regional experience even more striking.



6.5.2 Consider the tour to Ilha da Restinga a product based on ecotourism. How do you evaluate the business, in terms of strategic marketing actions? What would you change?

For this matter, students should think of suggestions for positioning the business, so that actions are directed to attract visitors, driven by the same values found at the site. As an example, they can use the fact that the tour does not have a specific name, and is marketed as a visit to the site, not as a product that has an image to be accepted by the visitor. Indeed, as pointed out by Kotler and Gertner (2004), tourism requires that image and brand strategies be implemented, based on the local reality. It is also possible to emphasize the core business of the place and the actions of experiences for the visitor, such as the invitation to participate in the production of fruit jam and the visit to the house built with demolition material, all of which can be highlighted in the brand positioning.

Thus, although the Limeira's identifies the values sought by tourists, in terms of performance (social and emotional values), when modifying the structures found on the Island, it is necessary that they understand how they put themselves in terms of consumers and payers, seeking also analyze the competitive environment (Kotler & Gertner, 2004), especially if we consider the relationship between managers and local tourism agents. In this sense, students can take as a basis the description of the ecotourist's profile, in terms of psychographic characteristics, as well as their main motivations (Wearing & Neil, 2014) to support strategic marketing decisions.

Still, students are expected to suggest that research be done to better understand the market in the state of Paraíba and the specific demands of tourists, as consumers of ecotourism. It is clear from the presentation of the case that, although the activities are based on environmental preservation, cultural appreciation, social promotion and experiences for the visitor, the entrepreneurs did not strategically emphasize these actions as a competitive differential for the business.

**6.5.3 In your conception, which elements of the marketing mix, developed by the Limeira's, would need to be improved? Given the information provided and with your knowledge on the subject, prepare an alternative proposal for the marketing mix of Ilha da Restinga.**





In this question, we seek that the student observes the case, from the perspective of managerial marketing, using the tool to support his proposal to Yuri. The marketing mix promotes a greater chance of success for the organizations that apply it, as defined by Kotler and Keller (2012) and Urdan and Urdan (2013). The student must consider tourism as part of the service sector, being analyzed from the perspective of supply and demand. Still, it is possible for the student to identify that not all elements of the marketing mix need to be reformulated, considering some as appropriate. The product and place are the ones with the best configuration, since the tour can be customized to the needs of different types of tourists, and the place, in terms of structure and access, being equally suited to the proposal. However, partnerships with other local agents that work with water sports can be suggested to offer entertainment services on Ilha da Restinga, thus increasing the range of options for activities to be carried out around the island, improving the product.

On the other hand, it is necessary to reformulate the price and promotion strategies, and the student must recognize this need and define ways to improve these elements, such as new partnerships with distribution channels, such as tourism agencies in other states; and greater digital presence, allocating part of the revenue to investment in digital advertising. It is also possible to provide points of sale (physical establishments), for users who want to know about and buy the tour; or suggest that the Limeira's invest in its own digital point of sale channel, through a website or app. The question makes students develop a marketing strategy so that the demand for the tour increases and, therefore, we expect several suggestions to arise.

6.5.4 Imagine that you are Yuri Limeira. What decision would you make about the tour on Ilha da Restinga? Consider the consequences if you decide to continue or terminate activities on the Island, justifying your decision.

This question has the purpose of making the student put himself in the position of a decision maker. For this, the student needs to be able to analyze the scenarios and variables that involve managerial alternatives, making use of alternative assessment tools, such as pros / cons and decision trees (Sobral & Peci, 2013; Maximiano, 2004). As a result, the student may decide to end the tour or try to strategically reformulate it.



In order to make a decision about the maintenance of the tour, the student can consider its importance for the local production chain and territorial development (Dalla Costa & Souza-Santos, 2011). The opposite decision, of closure, affects several agents involved in the activities of the Island, ranging from salespeople in the city of Cabedelo to the direct employees of the tour.

Thus, the problem of the decision lies mainly in the social, economic and environmental impact that the tour sought to achieve, which are elements of sustainability, with a focus on the triple result (Solomon, 2011). However, for the business model to be considered sustainable, it should obtain satisfactory financial results for the interested parties, which it fails to accomplish, and this point must also be addressed in the student's analysis, since it also weighs in the decision. In this way, the question can generate a favorable or contrary understanding to the maintenance of the tour, depending on the student's justifications to support his decision.

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