

IRFGT 2015

# Abstracts & Selected Papers eBook

4th International Research Forum on Guided Tours  
Estoril, Portugal | 18th-21st March, 2015



Escola Superior de Hotelaria e Turismo do Estoril

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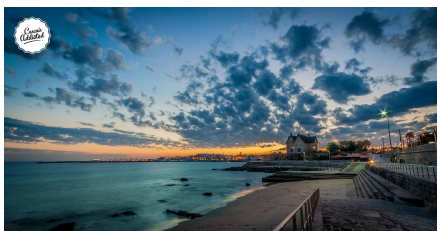
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## Introduction

The International Research Forum on Guided Tours had its roots in Sweden back in 2009 and every two years it has been bringing together different actors within the scope of Guided Tours.

From academic to practical perspectives, each Forum has been rewarding its participants in intercultural, intellectual and professional terms. Bearing in mind that common aim, after the meetings in Sweden, the UK and the Netherlands, in 2015 the IRFGT headed southwest to Portugal. In Estoril, delegates were welcomed around springtime, from the 18th to the 21st March.

## ESHTE & IRFGT 2015

Created in 1991 the Estoril Higher Institute for Tourism and Hotel Studies (Escola Superior de Hotelaria e Turismo do Estoril - ESHTE) is a public higher education institution under the aegis of the Ministry of Education. In 2015, ESHTE had about 2,000 students.

ESHTE offers five different graduate degrees:

1. Tourism Information
2. Tourism Management
3. Leisure Management and Tourism Entertainment
4. Hotel Management
5. Cookery and Food Production.

Besides ESHTE also offers Masters and PhD programs in collaboration with national and international counterparts.

This higher institute also maintains cooperation protocols with fellow institutions from Europe (Erasmus program), the United States, Brazil, Macao, Africa and East Timor partners.

ESHTE has been training Tour Guides since 1992. Therefore, it seemed proper to host the 4th edition of the IRFGT, not only as a means to invite other European professionals and researchers to the meeting's debates, but also to form new alliances with more world-wide counterparts. Therefore, the IRFGT 2015 organizing committee was formed by:

Miguel Brito - Coordinator/ESHTE

Carla Braga - Coordinator/ESHTE

António Gonçalves - ESHTE

Cândida Cadavez - ESHTE

Cristina Carvalho - ESHTE  
Dineke Koerts - NHTV, Breda, The  
Netherlands  
Gabriela Carvalho - ESHTE  
Mikael Jonasson – Halmstad University,  
Sweden

Phil Smith – University of Plymouth, UK  
Rosângela Baptista (for the PR and  
Events Office)  
Vincent Zammit – Institute of Tourism  
Studies, Malta

## Guided Tours

In recent years, the rapid development of tourism, both globally and on a national and local scale, changed the traditional ways of doing tourism and the needs of tourists. Once changed the expectations of consumers and consequently the demand, supply must immediately adapt to the new reality. On the one hand, the notion of heritage was widened (natural, environmental, cultural, artistic and immaterial), which requires greater preparation of tourist information professionals as interpreters about the different types of heritage. On the other hand, the emergence of new information technologies, the fast changing of the products and attractions offered to the tourists requires that other tasks have to be assumed in the case of tour guides.

Among the roles of guides, some should be underlined as becoming increasingly relevant: interpretation, heritage safeguard and control, the protection of tourists and of the host community, mediation and conflict management, and the control and lead of the group of tourists. Less important are considered the roles of animator (whose specific characteristics should be refocused) and pathfinder.

Also less important is becoming the plain informative role due to the large use of new technologies by the tourists - any tourist has access to the means of geographic information and guidance by GPS, as well as technological media, such as the Internet, mobile phones, I-phones, podcasts, audio guides and MP3.

Therefore, the roles of communication/interpretation (as psycho-social roles that encourage change in values), mediation (avoiding misunderstandings and conflicts), leadership (especially in the sphere of safety and security), sustainability (as manager and protector of resources) and education (from an intercultural perspective) are gaining more impact.

Tourists who ask for a tour guide have become less tolerant of any mistake made by these professionals. In this sense, they require deeper and broader knowledge, more appropriate attitudes to different situations of everyday life and behaviour more suited to the culture of the tourists. In short, the guide's intercultural skills are assuming great relief.

Bearing these reflections in mind, IRFGT invited professionals, students, researchers and academics in general to submit papers focusing on the «Here/There», «Today/Tomorrow», «You/I», «Human/Technological» facets of tour guiding and guided tours. The themes of the forum focused on sustainability, tour guides empowerment, destination promotion, interpretation and innovation in guided tours.

### Scientific Committee

Branislav Rabotic  
Cândida Cadavez  
Cristina Carvalho  
Dineke Koerts  
Fernando João Moreira  
Francisco Silva  
Isilda Leitão  
João Reis

Miguel Brito  
Mikael Jonasson  
Nuno Gustavo  
Phill Smith  
Raul Filipe  
Reidar J. Mykletun  
Vitor Ambrósio

## Abstracts & Full Papers Availability

40 abstracts and 7 selected papers are published online in the present "IRFGT 2015 ebook". The IRFGT 2015 electronic book of the conference is available in the RCAAP portal. The book is also available through various research tools such as B-ON (<http://b-on.pt>); GOOGLE SCHOLAR (<http://scholar.google.pt/>); DRIVER SEARCH PORTAL (<http://search.driver.research-infrastructures.eu/>).

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## ABSTRACTS

### Session 1 - Sustainability of Guided Tours

*A barrier free guided tourism  
for people with an intellectual disability*

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**Keywords:** barrier free tourism, intellectual disability, target groups, images and texts

People with disabilities and older persons are becoming a growing group of consumers of travel, sports, and other leisure-oriented products and services. The tourism industry is increasing awareness on individuals with physical disabilities, although a lot needs to be done in order to better meet customer demands in terms of policies, training staff and strategies for promotion (Buhalis & Ambrose, 2011; 2012). What has not yet been investigated is the preparedness for the tourism industry to prepare for individuals with intellectual disabilities. The aim of this paper is to present the results from a survey among travel agencies web pages, answering the question of how they present tourism from a perspective regarding tourists with intellectual disabilities.

*Tour Guides and Destination Image:  
Evidence from Portugal*

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**Keywords:** tour guide, performance, tourist satisfaction, tourist experience, destination image

Tourism is a “communicational phenomenon” (Wainberg, 2003) *par excellence*; the best promoter of a tourism destination is that tourist well satisfied with his visiting experience. If he is badly received by the host community or by the professionals who accompany him, even visiting the most beautiful place in the world, he will be left with a negative opinion that, keenly, will propagandize. Acknowledging Tour Guides as an interface between visitors and hosts (Collins, 2000), our paper intends to determine how their performance influences tourist satisfaction and tourist experience (Mossberg, 1995; Zhang & Chow 2004; Bowie & Chang, 2005), as Tour Guides are the first attribute for a successful tour (Geva & Goldman, 1991) and for tourism destination images (Baloglu & Mangalahu, 2001).



*Empowerment and Sustainability*  
*in Community-based Tourism Narratives and Practices:*  
*Giving a Voice to Local Communities in Tour Guiding*

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**Keywords:** community-based tourism, guided tours, empowerment, sustainability

Tourism is a highly institutionalised sector in which service providers establish hegemonic relations of power and dependency among themselves, whereas host communities have limited participation in tourism policy planning and decision-making processes, only benefitting from their trickle-down effect, a condition that has intensified the host-tourist divide. To counter this ‘top-down’ approach to tourism, community-based tourism seeks to give a voice to local communities that use their social capital (Bourdieu, 1986) in the construction and representation of their own pluralistic narratives for tourists, thus having an active participatory role in tourism practices. This empowerment of local communities generates a greater sense of place and belonging that contributes to the positive promotion of the destination and to increasingly sought-after alternative forms of tourism.

This paper endeavours to analyse the local guided tours offered by the *Associação Renovar a Mouraria*, a community Association created in 2008 to foster social inclusion, intergenerational relationships and overall improvement of life conditions in the historical neighbourhood of Mouraria in Lisbon, one of the city’s most culturally and ethnically diverse quarters that has been subjected to urban regeneration in the past few years. These 2-hour walking tours conducted in seven different languages (including sign language) by tour guides who have been trained by the Association consist of an ethnographic-like itinerary through the tangible and intangible cultural heritage of Mouraria, hence the initiative’s motto “History and stories with people inside”. The revenues generated by these tours support the project Mouraria for Everyone, which aims at providing free-of-charge tours to the neighbourhood for groups with special needs. This case study thus epitomises a grassroots approach to tourism and tour guiding that empowers local communities in urban life, contributes to socially and culturally sustainable development and improves the image of the neighbourhood and its perception by residents and visitors alike.

*The relationship of tour operators  
with tour guides in performing their professions*

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**Keywords:** tour guide, tour operators, handling agencies, travel trade, package tours.

Tour guide is considered to be an important element of the organized package tour. Though so, there is a lack of theory and knowledge concerning guides' place in the tourism system. There are only a few studies concerning the role of the guide, interpreted by tourists' perspective. However, as tourists are strangers to the destinations, they may not be able to completely judge the guides' function, knowledge content and guiding quality. Respectively tour operators' perspective gains importance. Although tour guides are employed by tour operators, there is scant research that reflect tour operators' view to guiding. Nor there is much research on guides' perceptions of the travel industry. Therefore the objective of this study is to analyse the quality of guiding services from Turkish tour operators and guides perspectives and determine the possible gaps in the industry. Turkey is an ideal domain to study guiding since the profession is strictly regulated. There are currently more than 15.000 licensed Turkish guides. Various obstacles associated with the service of guides and their relationship with tour operators require attention from academia. A questionnaire was employed to collect data. The attributes used in the study to measure quality of guiding and relationships of tour guides with local tour operators were identified through extant literature review as well as an inductive process of semi-structured interviews with ten guides and six local tour operators offering guided package tours to various international markets. Main data collection instrument was adopted based on the content analysis of interviews with stakeholders. 107 professional guides and 56 tour operator experts were surveyed between March–July 2014. Insights for better cooperation between tour operators and tour guides are sought, suggestions for practitioners, destination planners and scholars are offered.

## Session 2 - Education and Training

### *Alternative Tours and the preparation of future Tourist Guides*

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**Keywords:** training, alternative tours, creativity, authenticity

Generally speaking tours on offer are the usual run of the mill tours. They are packaged, have been tested, and sell. The increase in more educated travellers has resulted in more and more visitors opting to experience a different kind of tour. The lure of the low budget airlines have also increased the amount of visitors to locations where one can dedicate a number of days to cultural visits. This is an opportunity for alternative tours to be planned and offered by the authorities. Meanwhile the problems of tours organised by independent tourist guides crops up. Large agencies offer the usual well tried tours, where in all probability places are too crowded. Very few individual and independent tours are on offer. Yet this is the opportunity to offer an alternative route and diverse locations, thus providing a more authentic look into the everyday life of the locality.

The need to empower future tourist guides is now felt to be of greater importance than ever. There is the need to have them empowered with the necessary tools to upgrade their own offers. In Malta, this is being achieved by having the students know the main sites, become familiar with the main sites, and then discover and create their own alternative tours to the same areas.

The main focus of my paper is a look at what is on offer and the way that the training takes into consideration the preparation of future tourist guides, how to offer alternative routes and tours, the different themes that can be offered and encourage their creativity.

### *“Tourist Guiding” as a New Course in Higher Tourism Education:*

#### *The Case of College of Tourism in Belgrade*

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**Keywords:** tourism, tour guiding, education and training, College of Tourism

In many countries tour guiding is a regulated profession requiring a license, which is most often acquired through some form of education or training and examination or

testing. Apart from specially organized courses where applicants get basic practical knowledge on tour guiding, there are also examples of 2-4 year long education at special tour guiding departments or study programs of the existing tourism colleges and universities (Turkey, Egypt, Latvia, Malta, etc.). On the other hand, the topic of tour guiding as a distinct tourism activity is not sufficiently represented in the curricula designed and offered by vocational and academic institutions where future planners, managers, organizers and similar tourism professionals are educated. As a result, tourism stakeholders, such as government and quasi-governmental tourism organization, destination management and marketing agencies, tour operators, travel agents, tourist attraction managements and the like, would not be able to display a deeper understanding of the roles of tour guiding, the way of its operation and practical problems. This paper analyzes the case of the College of Tourism in Belgrade, which, for almost half a century, has been educating economists for tourism. The curriculum has recently been enriched by an elective course named "Tourist guiding" which students can decide to follow in the third year of study. The experience with the first generation of students who attended the newly established course has proved that its inclusion in the curriculum is a welcoming and successful move, which might be considered by other higher educational institutions for tourism.

### ***Portuguese Guides' Education and Training***

#### ***The case of ESHTE***

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**Keywords:** tour guides, education, training

Tourism is one of the main activities in Portugal, where many foreign visitors choose Cultural and Landscape Touring. Many touring visitors who visit Portugal ask for a professional Tour Guide. Tour guides have an extremely important role, leading the visitors to know the country through the guides' eyes, words, knowledge, education, culture and behavior. Therefore, the training for the future tour guides is essential, including many subjects about culture, intercultural communication, foreign languages, natural heritage, but also professional practice of guiding, assistance during tours and many subjects that will allow the future guides to learn how to deal with the situations of a tour guide daily life.

Due to new technologies, tour guides have new challenges in their work and the training of tour guides should adapt to this new reality. Every year the guides' education changes, in order to provide the newest and better tools to adapt to the guide's work.

Our aim is to show how training is done in Portugal, as well as the adaptation that was made of the European Norm 15565 (2006) about the guides' training. A SWOT analyses

about the education provided in ESHTe will also be presented.

*The importance of Tour Guides in Sacred Spaces:*

*The case study of Montserrat Monastery*

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**Keywords:** religious tourism, sacred spaces, Catalonia, heritage interpretation, tour guide's training

Sacred spaces attract visitors with different motivations. On the basis of sacred spaces McGettigan (2003) presents the relationship between cultural, religious and spiritual tourism. Both, pilgrims and tourists have in religious and sacred spaces an attitude of reverence and respect and seek to have transcendent experience.

But, in sacred spaces we can also find cultural tourists, spiritual tourists and ecotourists, among others. If space is common in all these types, what differentiates them is motivation and behaviour of tourists in these areas. The presence of visitors in sacred spaces leads to new forms of exchange and interaction between religion and the tourist motivations.

This leads to different expectations of the visit, different needs and, sometimes, to conflicts. Authors like Schakley (2001) suggest that the way to manage all these motivations trying to minimize negative impacts and conflicts is through information. And guided tours are a key element that can help these places and at the same time can highlight religious, spiritual and cultural values.

The sanctuary of Montserrat, with about 2,5 million visitors per year, is the second most visited place of religious tourism in Catalonia after the Sagrada Família. This is a complex religious tourism place because it includes the shrine but also a monastery, a museum, a Natural Park and a complex with numerous services (restaurants, shops and hotels).

The managers of this space are aware of the great diversity of visitor's motivations, so they propose different guided tours, which we will analyze in this paper. But each day there are a lot of organized tours that arrived to the sanctuary with their own guides. This is the reason why a survey among them was made and, based on the results, a course for guides is being organised on March 2015. In the paper we will present, also, the results of this course.

## Session 3 - Tour Guides' Qualification

### *An Examination of the Impact of Communication Competencies and Personality Traits on Tourist Guides' Livelihood*

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**Keywords:** tour guides, communication competencies, big five personality

Effective communication is one of many skills professional tour guides need to possess to effectively perform their jobs. Since tour guides act as the first point of contact and may be the only source of initial information for visitors, their communication skills and personality types can not only impact how the visitors feel when they leave the destination but also tour guides' own livelihood. The purpose of this study was to explain the extent to which communication competencies and personality types influence tour guides' performances, as measured by two livelihood indicators such as earned tips and overall income. Data were collected from a sample of 326 professional tour guides via self-report survey. Factor analysis delineated underlying domains of communication competencies that were later used as independent variables in multivariate and multinomial logistic regression models. The study results suggest that verbal and non-verbal communication competencies including language abilities, friendliness, poise, and attentiveness, play a role in predicting tips earned. In addition, the present research has found that three of the Big Five personality traits (agreeableness, conscientiousness, and intellect and openness) are useful predictors of tips and general income. Theoretical and practical implications are discussed within the realm of Behavioral Communication Competence and Big Five Personality Traits.

### *Innovative Aspects of Guided Tours*

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**Keywords:** guiding, innovation, literature review, place, time

Guided tours are commonly used in a variety of circumstances, and their shapes and contents have shifted through times and between different places. Their forms can consist of a group of people following their guide on foot or by other means of transportation, it can be a tour lead by technical devices replacing the conventional guide, or it can be an informative walk accomplished with elements such as theatre, poetry or sporting activities – just to mention a few examples. Our argument is that

guided tours, although they all aim at learning something about the location where they take place, can alter their shape, content and audience depending on the circumstance in which they take place. In order to understand these processes, we aim to study the literature on guided tours from an innovation perspective. By this means, we can understand the developments in guided tours from a theoretical perspective. Innovations have for a long time been studied within product development, but have for the last years been examined within service studies also. We therefore aim to study a range of publications on guided tours and to focus on how they have changed through time, but also according to place. Coming from a social science background, we not only treat innovation as something connected to technical development, but see it as a form of development that can take many shapes, including organizational and process innovation. This is the first of a contemplated two-step research study, in which we later aim to study an empirical selection of guided tours, understood from an innovation perspective.

*Cross-cultural Communication  
and Foreign Language-speaking Guiding Services*

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**Keywords:** guiding services; sino-western cultural differences; cross cultural communication

With China's tourism industry continuously developed and the number of foreign tourists increased, guiding services have become an important symbol of modern tourism industry. During the foreign language-speaking guiding services, Sino-Western cultural differences may seriously affect the quality of guiding services and even hinder the progress of the whole tour activities, just because of further deepening of contact between foreign tourists and tour guides. Therefore, not only need the foreign language-speaking tour guides to improve their foreign language and guiding skills, but also to enrich their knowledge of western culture and develop their skills of cross-cultural communication.



## Session 4 - Tour Guides' Certification and Concerns

### *Tour Guiding Certification, Quo Vadis? Conflict of Roles*

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**Keywords:** tour guiding education, tour guiding certification, tour guiding qualification, tourism education, Turkey

The main objective of this paper is to ignite a discussion on the challenges in tour guide training dilemmas as well as reviewing the tour guide training paradigm with specific reference to Turkey. Also named as interpreters, cultural representatives, cultural brokers, pathfinders and mediators from different perspectives, tour guides have their righteous position in nearly all tourism systems. Turkey, a country boasting about rich cultural heritage, is technically faced with a three-fold tour guide education structure; which is practised at two-year associate's degree programs, undergraduate programs and finally certificate programs, which take 700 hours, offered by the National Union of Tourist Guides' Chambers. At the end of the each program, participants are entitled to be a licensed tour guide, which sparks a fierce debate on who holds the authority. What's more, notwithstanding the fact that tour guiding is offered at tertiary education level, which is governed by the Higher Education Council, National Union of Tourist Guides' Chamber, a trade association, at the legal level assumes the responsibility on legislation procedures ranging from tour guiding regulations to curriculum design, where the conflict gets deeper and deeper. Touching on some global tour guiding education systems, this paper sets out to shed some light on the challenges and issues on tour guiding with specific reference to Turkey and seeks an answer to the question of whether an internationally-adopted curriculum framework is feasible.

### *Tourist guides' concerns*

#### *- four European examples*

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**Keywords:** work organisation, working conditions, work-related challenges, innovation, training, quality assurance

Most research on tourist guides are conducted in non-European areas, leaving the understanding of the European guides without research-based support regarding their work organisation, working conditions, work-related challenges, innovation, and

training. Such issues ARE explored in the present study through focus group interviews in Barcelona, Budapest, Malta, and Stavanger. Participants were guides, guide trainers, tour organisers, and destination managers. Each focus group lasted for 2 – 3 hours, and the group members should be prepared to share their opinion about tourist guiding with regards to a) selection, training, and quality assurance; b) types of experiences that guides facilitated for tourists; c) how controversial issues were handled; d) new technologies in relation to guiding; e) needs for innovation in guiding; and f) other challenges in the guiding business. The discussions were recorded and transcribed and transcripts analysed. The 12 inter-related topics that emerged were analyzed and are the focus of the study. (1) Conditions for guiding varied between countries and places; 2) Guide licensing was called for, but often ineffective if installed; 3) Role of guides' national organizations was weak; 4) Guide training varied greatly in structures and content and needs updating; 5) Further education and quality assurance varied and was called for; 6) New technologies were useful for guides but cannot fully replace them; 7) Innovations in products and techniques were needed; 8) Sensitive topics were omitted if possible; 9) Sustainability was generally not emphasized; 10) Experience creation through guiding might be improved; 11) Awareness of interculturality were present but not fully used; and 12) The guide profession faced an extensive list of challenges). In conclusion, guiding as a profession has a great future if supported by appropriate training and improved working conditions. (The study was part of Innoguide: Innovation in LLL Tourist Guide Training, Tourist Guides as Partners for a Sustainable, Diverse, and Exciting Europe, WP2; Project No. 510487- LLP-1-2010-BE-LEONARDO-LMP).

*Significance of tourist guides and problems  
existing in tour guiding, evidence from Jordan*

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**Keywords:** tourist guides, challenges, seasonality, work environment, physical and social problems, Jordan

Tourist guides plays a vital role in the tourism industry in Jordan. In the meantime this key player is widely underestimated by the other tourism key actors. However, in Jordan, there has been research to observe the unhealthy attitude and skills of local tourist guides. Literature review suggests that little attention is paid to the occupation related challenges of tourist guides in Jordan. This study aimed to investigate challenges professional Jordanian tourist guides encounter. Furthermore, it endeavors to make some proposition and recommendations in this regard. To achieve these goals various real-time guiding tours were carried out accompanying real professional tourist guides during their work in different Jordanian sites in different months and seasons between

2010-2012, the participative observation included in depth discussion with guides in diverse places and the focus was to explore the perspective of this occupation in terms of seasonal, working environment and social physical challenges. The participative observation served to detect the challenges faced by tourist guides in real times and real environment. The study revealed some important challenges influence the professional stability of tourist guides, the study showed that the nature of tourist guiding involved various difficulties that impact their working conditions; these included regional incidents and their impacts on the seasonality of this sector, more over unclear profession relationship between tourist guides and tour operators and the nature of the work in its image on tourist guides. It also recommended that a review and a reestablishment of the working modalities should be set up. Moreover, the study concluded with the need for further efforts to fully understand the needs of tourist guides. The implication of this research stems from the fact that very little research, at least in Jordan, has embark upon problems that tourist guides encounter.

## Session 5 - Evolution of the Tourist's Profile and Demand

### *From Facts & History to Storytelling & Experiences*

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**Keywords:** storytelling, authenticity, branding, experiences, communication

Portugal is filled with history, surrounded by monuments that reveal its spirit of conquers overseas. For a tourist guide is easy to be led by facts, dates, following a script of information. As differentiation is getting more and more difficult between companies, services or destinations, storytelling has become a powerful tool of branding.

Storytelling used as a communication tool helps companies to connect with customers. A good story can create emotions and feelings on the consumer. With narrative techniques adapted to target each audience, the storyteller can evoke memories. The authenticity of the story can determine the way people bond with it. A good story needs believable basic facts but can incorporate myths or fantasy elements.

On average, 500 tourists visit Cascais per day. First stop at Boca do Inferno (Mouth of Hell) ending in the Vila (town centre) I could say that just a few guides would tell the legend behind the name Boca do Inferno or the origin of the name Cascais. Details around the landscape can help the viewer to capture and remember the moment.

Experiences such as gastronomic tasting, medieval fairs, handcraft workshops, and rural activities are getting more requested and can determine the success of a trip.

A local guide that shares his or her own experiences and life stories around the tour creates a positive connection and trust.

Stories sufficiently unique are more difficult for others to copy.

It is undoubtable that the role of the guide is changing, getting less formal to become part of a story, stimulating the imagination and amusing the tourists.

Is this a risk to quality of service or is this a way to share cultural values and attract more people?

*Writers' House-Museums and Foundations, in Portugal,  
and Literary-Gastronomic Tour Routes: The possible role of the Tour Guide*

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**Keywords:** writers` house-museums and foundations,  
literature, art, gastronomy, tour guide

Literature, along with the Arts, presents territories (whether real or imaginary) that may turn into destinations also attractive to gastronomic tourism. Ever since Plato's *The Banquet*, in more philosophic terms, through to the Literature of the 21st century, places, atmospheres, times, differentiated gastronomic products and gastronomies in general have proven the subject matter for reflection on by writers and artists.

In the Portuguese case, tourism products and services related to Literature and Gastronomy have been launched, as is the case with some Literature routes as well as some Foundations and Writers' House Museums. However, we would consider they have failed to gain their due level of impact and profile both nationally and internationally.

In addition to some efforts already undertaken, we would propose far greater investment, internally and externally, in promoting Portuguese gastronomy as a tourism product associated with Literature. The role of the Tour Guide in this promotion can be of vital importance.

Hence, we first set out a brief approach to the interrelationship between Literature, Arts and Gastronomy, secondly highlighting some of the most significant examples in terms of the range of products and/or menus based on gastronomic-literary references in regions or in House-Museums and Writers `s Foundations.

Our methodology makes recourse to literary texts, to art, cinema and geography as well as other sources deemed necessary to attaining the objectives of this paper. Based upon the documental research undertaken, the material resulting was subject to analysis in order to cross-reference evidence from various different sources as, in accordance with Yin (1994), the purpose of documental research is to enhance the evidence and the sources encountered, the researcher himself being the main tool of the research (Berg, 1995; Giddens, 2007). Within this framework, the documents collected were subject to analysis and interpretation with the objective of identifying their incidence, occurrence, content and characteristics as well as their mutual links and bonds.

***A Leading Tour Guide in Turkey in the Early 20th Century:***

***The Fisherman of Halicarnassus***

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**Keywords:** The Fisherman of Halicarnassus, tour guide,  
oral history study, Anatolia, Turkey

Cevat Şakir Kabağaçlı was a leading Turkish writer of novels and short stories, as well as being considered as a leading guide. He lived in Istanbul, Bodrum and Izmir between 1890-1973 years. Kabağaçlı, known as “The Fisherman of Halicarnassus”, enrolled into the Oxford University and got a bachelors degree of New Centuries History Department. Kabağaçlı was born into a prominent Ottoman family and his father, Şakir Pasha, was a governor and that enabled him to receive a good education, travel many countries and be able to fluently speak many languages. He was known with his intellectual way of thinking, and during his academic life in UK. He decided to promote and introduce many aspects of Anatolia in Europe by performing a work in many libraries and most famous museums in Europe. He guided many politicians, authors and scientists who were visiting Turkey and he undertook the mission of enlightening them about Turkey himself. In the 1960s, he started to train candidate guides and gave education in guidance courses. The aim of this study is to emphasize contributions of The Fisherman of Halicarnassus, who is known as litterateur, author and traveller, to introduction of the Anatolia and underline the importance of these contributions for the profession of guide. In this study, the diversity among the tourist guiding resulted from Kabağaçlı’s intellectual approach and its unique aspects are discussed. This study was prepared within the scope of currently lasting Oral History Research of Tourism in Turkey. The procedure of this study depends on oral history interview and secondary sources were also utilized. The results gained from this study reflect that he with his knowledge is one of the pioneers for the profession of guide in Turkey and has a major role in discovering and introducing the historical and cultural heritage of Anatolia.

***Innoguide***

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**Keywords:** Innoguide, e-learning, guide trainers, guide organisations, education

Innoguide, an acknowledged Leonardo Lifelong Learning project was concluded in 2013. But the complex issues of the tour guiding world require more action, which resulted in a follow-up project called “Innoguide 2.0 – Guiding as a trigger for a more sustainable,

diverse and exciting Europe! Stimulating innovation and entrepreneurship in the field of guiding.” (in further text: Innoguide 2.0). The latter is a two-year project, part of Erasmus+ funding programme. It acts on various levels, addressing tour guides, guide trainers and guide organizations.

This paper brings an overview of the two projects and their goals. It shares the results of a comparative study of guide training programs in eight European countries. Furthermore, it includes a presentation of the open source Innoguide e-learning platform, which is currently being updated with more ready-made materials for guide-trainers. Based on the aforementioned study, the e-learning platform includes free teaching materials for significant topics that are often left out of national guide-training programmes: sustainability, interculturality and experiential guiding. Innoguide 2.0 introduces practical workshops for guide trainers.

Innoguide 2.0 develops helpful instruments for self-scan of guide organisations to help them raise awareness for the three main topics of the online platform.

Both projects have been coordinated by Belgian VisitFlanders tourism board, and the overall number of participating countries is 11. This is an important reminder that collaboration of different expertise (tour guides, guide organisations, educational institutions, tourism boards, service design professionals, etc.) is necessary for the improvement of guide profession all over Europe. It points out to the fact that many stakeholders benefit from the entrepreneurial mindset of tour guides, enhanced quality of guided tours and further professionalization of a tour guide in accordance to the evolution of a modern tourist. Innoguide will hopefully help achieving those goals on European level.



## Session 6 - New Technologies in Guided Tours

*Lisbon (E)Motions: A Survey on the Experiences of Group Travelling Tourists*

*Based on the Information Given by their Guides*

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**Keywords:** Lisbon, questionnaire, guided tours, quality of life, perception

Tourists recently awarded Lisbon as the best city break destination in Europe. This article analyses the types of experiences tourists have travelling in the city of Lisbon when they are advised by their guides about what to do or visit. The research method is the questionnaire, aimed at investigating the choices of tourists in the area of mobility, their perception of the quality of life and their level of appreciation of neighbourhoods, landmarks and infrastructures. Conclusions state that there is an obvious link between the quality of life and the quality of the tourist experience but it is difficult to measure it. Through this questionnaire, we hope to have made a small contribution to the understanding of the perceptive sphere of the tourist and his choices in terms of behaviour, which are an essential element of any strategy for tourism marketing.

*The accessible tourism in Lisbon  
as a challenge for the “art” of tourist guiding*

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**Keywords:** tourism, accessibility, accessible tourism, human barriers, tourist-guide

Accessible tourism is an increasing reality today. People with special needs are travelling all over the world, thanks to the last developments at technological level but mainly because of the changing of mentalities about impairment. This important changings that can be found in several aspects of our society, result from the passage from a medical to a social model that allowed to understand better the wishes and needs of these people.

Tourism destinations have to be prepared to receive this new kind of tourism and the required adaptations must concern not only the physical barriers but also the human ones, which sometimes are much more difficult to identify.

Tourism professionals in general should be informed and trained to deal with the

human diversity concerning those tourists to be able to answer to all their needs in a correct way.

Tourist guides are some of the most important professionals on dealing with accessible tourism and their performance can be of extreme importance for the success of a travel experience.

To be able to guide a group when there is someone travelling with a wheel chair can be a challenge and requires some sensitivity and knowledge not only about special needs of the visitors but also about the real accessibility conditions of the places that are going to be visited.

Based on the professional experience of the author, several interviews to tourists and day visitors and the results of a focus group with 8 tourist guides working in Lisbon, this paper pretends to give some answers about what visitors with a wheel chair expect from a tourist guide and how these are supposed to behave in such a situation.

### *The path of “Caminhos da História”*

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**Keywords:** case study, tour operator, marketing and promotion, cultural heritage

In this article we bring insights based on a case study “Caminhos da História” – a small tour operator company offering guided tours in the city of Tomar, in Portugal, and its region.

The city of Tomar is home of the UNESCO World Heritage Convent of Christ – and “Caminhos da História” offers tours to explore the culture and history of the Templar’s Order, offering therefore several packages of single or multiple days, including the Knights Templar Experience. These packages are available for the domestic tourists in Portuguese but also for the international market in several languages.

The methodology approach is a single case study. Secondary data was collected via (online) documents relatively to the small enterprise and primary data through an interview and direct input of the co-owners of the enterprise, as well as testimonials from consumers.

As a case study we take a holistic approach touching several aspects such as the value of natural and cultural landscape and the importance of its interpretation in a personalized context. We will also have a closer look to aspects of promotion and

(digital) marketing, as well as of qualification and certification and the importance of partnerships in empowering tour operators.

This study brings forward insights useful for small tours operators. We extract the key lessons of “Caminhos da História” in entering the market and keeping afloat while enhancing the quality of the product and of the services offered.

***Additional Programs to Formal and Non-formal Tour Guide Education in Turkey:  
Specialized Certification Programs***

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**Keywords:** tour guide, tour guide education, specialized certification, professional associations, Turkey

Tour guide education in Turkey, which is carried out as both formal and non-formal, has a considerable role among the proper introduction of cultural and natural heritage of the country, the formation of positive impression among the tourists visiting the country, and the reputation of the country. Being a certificated tour guide in Turkey requires completion of one of the semiannual certificate programs for rare languages provided by the Union of Tourist Guides Chambers (TUREB), which are supported by The Ministry of Culture and Tourism, or associate-bachelor degrees of Tourist Guidance in universities. In addition to these programs, the specialized certification programs, which are arranged by the Professional Associations of Tour Guide provide more qualified tourist guides. The aim of this study is to briefly evaluate the formal and non-formal tour guide education in Turkey and specialized certification programs, which are arranged as support programs. The scope of this study includes the examination of processive steps of specialized certification programs, consideration of their contributions to tourist guides, travel agency and tourism sector and some suggestions towards the tour guide education in the future.

## Session 7 - Heritage Interpretation and Communication

### *Butler's Destination Life Cycle Model Applied to Estoril:*

#### *Proposition of a Walking Tour*

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**Keywords:** Estoril, walking tour, Butler's Model, tour guiding

Estoril name resounds across Europe bearing a refined connotation similar to the glamour of Monaco, Cannes, and Biarritz. As a tour guide and a professor at the local Higher Institute for Tourism (ESHTE), this proposition has been partially accomplished with Tourism Information students, so the future professionals may unveil the resort's timeless appeal.

This half-day walking tour recalls Butler's Destination Life Cycle's theoretical model. After providing recent data on the resort's tourist stamina, one shall introduce a few surprises in 6 steps: (1) Exploration starts at the seaside, where Chalets Barros and Tamariz recall the late 1800s climatic motivations, alongside the ocean's scent and the seagulls' songs, with the guide holding a parasol to protect the skin; (2) Involvement will be recalled at St. Anthony's church, while touching the narthex's Baroque glazed tiles; (3) skipping to the Estoril's Park we will actually meet Mr. Fausto Figueiredo, the entrepreneur portrayed at the bronze statue, for Development was linked to the resort he planned and the companies he founded. Holding the blueprints, he shall describe his dream-like vision, while we will actually behold the existing structures; (4) the visit then proceeds towards the Exiles Museum with references to the resort's Consolidation stage linked to crowned leaders here exiled in the 1940s/50s; (5) climbing down the Museum's stairways wearing a black trench coat will suggest the Stagnation decades that ensued, but back on the street the smiling guide takes the garment off, speaks of (6) Rejuvenation, and leads the group to admire the recent Congress and Wellness centres built on sustainable materials.

The tour ends with the contemporary version of the 1930s Estoril Cocktail served in one of the resort's hotels, with Mr. Figueiredo toasting to the Future. Cheers!

*The Summer Palace, Beijing:  
Interpretation and National Identity*

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**Keywords:** China, national image, the Summer Palace,  
interpretation, patriotism Introduction

Chinese tour guides have recently been the focus of various studies (Xu, Cui, Ballantyne, & Packer, 2013; Kong, 2012; Dioko, Harrill & Cardon, 2010; Huang & Weiler, 2010; Yang & Chen, 2009) but what they actually communicate to English speaking tourists at major tourist sites and how their stories compare to other interpretive media remains unclear. This paper aims to lift a corner of the veil by analysing the content of four types of English language interpretation at the Summer Palace, Beijing. These are the on-site signs; the “electronic guide” or audio tour; a printed brochure sold at the ticket booth; and the narratives of four tour guides.

#### Method

The information was collected between in 2013 and 2014. The research was conducted from a qualitative perspective. Its aim was to explore and describe (Neuman, 2011) the content of narratives produced at the Summer Palace against the backdrop of China’s quest for a viable national image. Preferred Chinese ideas of what China is and stands for are not only communicated abroad. At home, heritage sites are powerful locations for disseminating current state ideology in which patriotism, notions of a “harmonious society” and communist values all mix and mingle (Breslin, 2011; Wang, 2011; Callahan, 2012; Hill, 2012). An inductive method was used. From the gathered data recurring concepts and themes were distilled and analysed to reveal the extent to which narratives on “patriotism”, “harmonious society” and/or other ideas are communicated to English speaking visitors at the Summer Palace.

#### Findings

All forms of interpretation, including the interpretation delivered by tour guides, seem to be based on a cognitive approach in which “facts”, dates and numbers are key ingredients: when a structure was built, by whom, how it was named and renamed.

Another notable feature is the use of superlatives such as first, largest, the most . . . in the world. The endless repetition of such superlatives can be interpreted as affirmations of patriotism, especially since some of the claims seem rather far-fetched and the result of an intent to find something at all costs in which to rank first, biggest or best. What to think of the Summer Palace as “the most perfectly preserved imperial garden with the

richest man-made scenery and most concentrated architecture in the world”?

Most importantly, the Summer Palace is a location for fostering patriotism by appealing to anti-Western sentiments. This immense complex of gardens, lakes, pavilions, residential quarters, and even a “Western” area with palaces and fountains in Italian baroque style (Broudehoux, 2004; Chan, 1992) was constructed during the Qing dynasty (1644 - 1911) and destroyed by Anglo-French troops in 1860. Virtually every on-site sign mentions this “act of cultural vandalism” (Ringmar, 2006): the Long Corridor “was . . . rebuilt in 1886 after Anglo-French forces burnt it down in 1860”; the Gate Tower of Cloud-Retaining Eaves “did not survive the ravages of the Anglo- French Allied Forces in 1860”; the Hall for Listening to Orioles “was burned down by the Anglo-French Allied Forces in 1860 . . .”, and so on.

The various interpretative media do not really move beyond driving home the fact that the Palace was destroyed in 1860; they do not supply any context at all. We do not gain an insight into all the treasures that were lost or why the Palace was destroyed. Here tour guides could easily make a difference by adding stories or background information to evoke some emotion but this was not observed in the cases studied. Although friendly and knowledgeable, the kind and quantity of information delivered was very much in alignment with the other three interpretive media.

Concluding remarks

Although the Communist Party obviously wants to rally support for its patriotic policies and possibly gain sympathy from Western visitors by making the burning and looting of the Summer Palace in 1860 a key interpretive feature here, this does not really seem successful. In fact, the current interpretation is quite limited and one-dimension. It does not help the visitor “to understand, feel, and relive the heritage” (De Rojas & Camarero, 2008, p. 533) and fails to establish “a dialogue between international tourists and Chinese culture” (Ai, 2013, p. 245).

*House museums:*

*From personal to collective memory*

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**Keywords:** house museums, heritage, authenticity, representation

The concept of house museums – widely acknowledged in Anglophone countries where there has always been an interest in history, social development, and the preservation of the past – is associated to the institutionalization of places that communicate a country’s history and that of its inhabitants. Given that house museums mirror the

personal choices of their inhabitants, they entail the religious, educational, and social atmosphere of the time. Accordingly, such house museums bring about scientific and didactic values that are frequently in evidence when promoting these spaces of everyday life, which allow for a direct experience of a carefully preserved heritage.

Responding to a growing demand for authenticity, house museums enclose essential features of memory, values and identity, besides the awareness for the relevance of artistic, ethnographic and cultural heritage of a certain moment in time. Bearing in mind that the true essence of these spaces brings together a need to present a direct narrative to the visitor and the preservation of such narratives, it becomes a challenge to celebrate spaces where the private becomes public. To illustrate this challenge, we have chosen Number 29, Georgian House Museum in Dublin. The visitor is greeted by Mrs. Olivia Beatty, the first occupant of Number 29 Lower Fitzwilliam Street. She introduces the fortunate who lived with her in this elegant townhouse and the less fortunate who worked for the family, inviting the visitor to experience what life was like at the turning of the nineteenth century. Run as a museum of Dublin home life for the period 1790 to 1820, the visitor is guided from the basement to the attic through what is well thought-out as a unique collection of artifacts and works of art of the time. Thus, the large windows are now more of an invitation than a mere display of stateliness...

***Tour Guides and Tilden's Principles  
for the "Art of Interpretation"***

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**Keywords:** guides; tours; information; interpretation; tourism

This paper aims at finding out how much the Tilden's six principles for the art of interpretation benefit the tour guides profession. With this purpose, it was carried out a detailed reading on the existing literature about heritage interpretation and tour guides.

Results suggest that the art of interpretation adds value to the tourism industry. Furthermore, it produces benefits for the local communities and provides unique and memorable experiences to tourists.

A critical analysis based on the literature review and on the author's professional experience led to the conclusion that the Tilden's six principles are universal, have inspired scores of others, and represent a basic philosophy for the art of guiding tourists.



## Session 8 - The Value of Natural and Cultural Landscape

### *Green Capital – Green Spaces*

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**Keywords:** green capital, community, technology, outreach, sustainability

In his paper “Old Voices, New Platforms” at IRFGT 2013, David Smith introduced the Sediment project; a series of GPS enabled walks set in Bristol’s Victoria Park.

In 2015 Bristol will be the first British city to hold the accolade of European Green Capital. Bristol’s public parks and green spaces helped the city to win the Green Capital title on the basis of their number, strength and variety.

During 2015, the University of the West of England has organised a programme of work between the university’s students and researchers, and the city’s parks groups. These events aim to raise awareness of Bristol’s green spaces, their importance and multilayered roles in the city and to find more ways to join these green areas together in the public consciousness.

A series of web and locative media training sessions will be delivered by Smith and other faculty staff to enable parks volunteer groups to use digital tools to communicate to a wider public, both in, and beyond 2015.

Smith will also develop a new walk exploring the route of a 12th century water-pipe that runs through Victoria Park. This will act as one of several ‘Showcase projects’ to inspire the parks’ volunteer-force in all areas of Bristol to develop similar outcomes for themselves.

The project will culminate in a city-wide digital map of all of Bristol’s green spaces, which will be promoted directly to the visitor economy through Destination Bristol, the city’s tourism body.

With elements of tourism wrapped up in these events, this paper explores how digital platforms can help to bind these groups and spaces together in the visitor’s mind. It also goes on to further Smith’s proposition at IRFGT 2013 – that providing the tools for an authentic ‘community voice’ to be accessible, these walks and activities enhance the tourism industry.

*The Importance of the Photographic Contents  
in Illustrated Monographs of Tourism*

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**Keywords:** monographs; illustrated; heritage; cultural tourism; photography

It is common knowledge that illustrated monographs describing a specific place or monument help to show different angles or perspectives, to build a national identity or, in a lesser way, to serve high profit interests. It is our conscience that determines what we see and what we understand a specific place or monument. It goes the same way with every type of cultural heritage. It is our culture, education, environment and Weltanschauung that help us to consider several aspects of our world and its culture. The illustrated monographs and guides between 1920's and 1950's show the underlines of the future gaze that will endorse Cultural Tourism. We still view and accept the same photographic models from the 1920's and the 1930's as the main guidelines on a mainstream tourism flush. Should we accept this interpretation? Where eradicates this understanding of the definition of such monographs and guides? Do they identify our heritage in a credible way of sustainability?

*Valuing the cultural landscape in integrated tourism products: from the cartography of  
landscape units to the drawing of interpretative itineraries*

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**Keywords:** cultural landscape units, rural tourism, nature based tourism, integrated products; geo-cultural itinerary

There is a window of opportunity that must be explored: the conjunction of the global recognition of the importance of landscape quality with focus on multifunctionality and the promising growth prospects of rural and nature based tourism in Europe and, specifically, in Northern Portugal. Thereby, new perspectives are open to the development of an integrative approach to tourism offer, where cultural landscape may be valued as a cross-cutting resource.

Alto Minho (NW Portugal) is a predominantly low-density rural territory, with a rich cultural landscape shaped by agro-pastoral communities since the Neolithic. The concentrated diversity of potential tourism attractions and the combination of natural and cultural heritage are the main distinguishing factors of Alto Minho as a tourism

destination.

This research aims to show how the acknowledgment of cultural landscape unities is as a crucial instrument for the conception of interpretative itineraries, presenting, as an example, a geo-cultural route for the Arga range.

Driven by the previous goals, this work addressed the following challenges:

- a) Characterise the landscape mosaic of the study-area;
- b) Complete the inventory of the natural, built and cultural heritage relevant for the landscape reading;
- c) Identify the historical moments and processes that were crucial for landscape evolution;
- d) Enlighten the role of agro-pastoral techniques in landscape shaping, which must be preserved as an eco-sociological heritage;
- e) Conceive an itinerary capable of guiding the visitor through a comprehensive narrative of the territory, taking into account the specific characteristics and needs of tourism activity, considering the leisure and the economical points of view.

Despite the short-term growth potential of rural and nature-based tourism, their expansion may benefit from the development of a more integrated offer, widening the motivation spectrum. Heritage and cultural landscape touring may play a crucial role in the articulation of different tourism resources.

***Functions Assessment of Tour Guides Roles  
in the Romanian Protected Areas***

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Tourism in protected areas is a significant form of ecotourism in Romania. Among the opportunities, in order to minimize the negative impacts of tourism in protected areas - pollution, waste, pressure on natural resources and damage to ecosystems - is the use of tour guides, who have remarkable roles in tourism in protected areas, helping not only to make the travel experience enjoyable, but also to modify and correct visitor behavior, towards environmental and social responsibility.

Given the fact that unsatisfactory information is provided in Romanian protected areas, tourists are most likely to turn their attention to the tour guides for more information. Thus, tour guides are very important in educating visitors as their interpretation has a significant contribution to sustainable development of local communities in protected areas.

The proposed research field in this paper, aims to assess the level of importance of different functions of tour guides` roles in protected areas, which have the potential to contribute to the conservation of the natural areas where they operate by educating tourists through interpretation and modeling environmentally appropriate behaviors.

This work was financially supported through the project "Routes of academic excellence in doctoral and post- doctoral research - READ" co-financed through the European Social Fund, by Sectorial Operational Programme Human Resources Development 2007-2013, contract no POSDRU/159/1.5/S/137926."

## Session 9 - Alternative Tours

### *Can things be good tour guides?*

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This paper addresses how 'inanimate' objects might operate as tour guides in a site of heritage tourism.

We will approach this question theoretically through the neo-vitalism of Jane Bennett (with her adaptations of Bergsonian ideas) and her ideas about 'vibrant matter': how things have effective presence over and beyond the descriptions, reproductions and affects they generate in humans. We ask what might happen if one were to recruit such a presence into the role of a guide to the materiality, narratives and metaphors of a site.

We have approached this question practically by creating a tour 'guided' by objects that we call 'things-meanings'. The site of this tour is the early twentieth Castle Drogo designed by Sir Edwin Lutyens ('the last castle to be built in England'), a National Trust property in Devon (UK) and popular tourism venue. We describe the way that the objects were created in materials relevant to, or already found in, the building and how an accompanying map plays a way finding role in the tour. We describe how the objects were chosen, shaped, formed and assembled to interweave with narratives and metaphorical discourses already at work on the site or evoked in the map. We explain how, with the cooperation of the National Trust, the objects were then used in a series of experimental visits to the property and how these visits were monitored and assessed.

We will conclude by interrogating our findings from Castle Drogo, the results of a questionnaire filled in by those using the 'things-meanings', analysing how far the tour represented a genuine application of the theory of 'vibrant matter' and will propose where the experiment at Castle Drogo might be applicable to guiding practices at other sites of heritage tourism.

### *Psychogeographical counter-tour guiding: Theory and practice*

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In this paper, I want to outline and explain an alternative mode of 'psychogeographical'

counter-tour guiding that I have used in Manchester, Huddersfield and Leeds with groups such as the Huddersfield Psychogeography Network, the Loiterers Resistance Movement and the Leeds Psychogeography Group. My usage of psychogeography draws on the situationist practice of playful wandering without destination in order to: experientially make sense of and creatively engage in group dialogue about the changing form of towns and cities and to creatively consider what sort of societies we would really like. In doing this type of counter-tour guiding, I will explain how I conceptualise my approach as a psychogeographer, counter-tour guide and as a critical psychologist drawing on situationist theory, group psychotherapy and mobile methods research in psychology and geography. I also draw connection with other individual and groups doing similar adventures and journeys such as Walk Walk Walk, Wrights and Sites and also the Manchester Area Psychogeographic.

### ***Alternative tours in Zagreb***

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**Keywords:** Zagreb, themed tours, destination management, alternative tours, city tour

Despite the fact that Zagreb is Croatia's capital and a growing destination, it is not the most popular destination in Croatia, and it's still considered to be a short-term-stay destination. This fact leaves its visitors with a very limited time to spend in the city. It is thus surprising to discover a large variety of alternative city tours available in Zagreb.

This paper points out the most successful alternative tours and searches for reasons behind the non-successful ones. Not all of the available tours actually attract visitors, especially foreign visitors. This brings us to a recently acknowledged fact, that in the last few years, city tours have started targeting local audience, and not just tourists.

Some of the alternative Zagreb tours have been co-financed by the local tourism board for years. This presentation analyzes the reasons behind the DMO's decision to encourage the development of so many alternative tours by including them in their budgetary plans, and it is related to the sustainable development of the city's offer.

Variety of alternative city tours in Zagreb makes it a great case study full of real-life examples and comparisons, effects tours can have on local stakeholders and their expectations. It also delivers a clear insight about market demands and helpful information for both creative entrepreneurial tour guides, and destination management organizations.

*Literary Travel in the Full-day:  
Óbidos, Alcobaça, Nazaré, Batalha, Fátima*  
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**Keywords:** literature, guided tours, enrichment of standard information

In many southern European countries, licensed tour guides have a degree from a tourism higher education institution. The curricula of these courses emphasize the knowledge of foreign languages, History, History of Art and Geography. Although Culture plays an important role in these curricula it is not focused on Literature (though it is mentioned as part of the national identity).

In general, we agree with these curricula contents. However, we believe that it is possible to go beyond the simple transmission of information about the visited sites. Reading literary passages from reputable authors can carry tourists to a different world – a world described through the unique writer’s emotions.

The present paper’s case study will be based on a full day tour, with departure and return to Lisbon (Portugal), which includes the visit of five towns: Óbidos (a medieval town); Alcobaça Monastery (a religious complex of the Cistercian Order and World Heritage); Nazaré (a fishing village); Monastery of Batalha (a religious complex of the Order of St. Dominic and World Heritage); Fátima (a Marian international shrine).

In both, in the oral presentation and in the article, the intention is to show that it is possible to bring together, in a successful combination, standardized tourist information and the reading of literary passages, enhancing the wonder of the sites through the national and international literature.

## Session 10 - From Interpretation to Fabrication

### *The Excellence of Guiding*

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**Keywords:** education, qualification improvement, certification success

Businesses today compromise with nothing less than excellence. Tourism is probably one of the most demanding categories in the hospitality sector, and among it, tourist guiding is a job of an enormous responsibility. Tourist guides are expected to carry out the programs they are given to the best of their ability, vouch for the competence of the employer of the moment and, ultimately and above all, represent their city/region and country. Tourist guides are not just people that speak foreign languages and are interested in meeting other people. Their profile is that of an interpreter of their own country heritage, though carefully and differentiations and varied points of view. Their work is, in the true sense of the word, of national cultural importance.

The recognition of tourist guides is therefore a priority, not just in matters of professional skills but, most strongly, concerning their continuous and laborious education. The certification of their investment is crucial for the working partners awareness of their input and effort on self-improvement. A certified tourist guide is the key to a successful partnership between tourist guides and their employers.

### *From Spiritual Guide to Virtual Pilgrimage:*

#### *The Impact of Modernization on Shikoku 88 Temples Pilgrimage in Japan*

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**Keywords:** pilgrimage, virtual pilgrimage, Shikoku, Japan, spiritual guide

There is a long tradition of pilgrimages in Japan, particularly since the introduction of Buddhism in the 7th century. According to the Buddhist tradition, most of these pilgrimages used to be circular with a certain number of stations where pilgrims worship the image of Buddhist deities like Kannon (in Saikoku you can find some 33 holy places of Kannon) or the founder of a Buddhist cult like Kōbō Daishi (774-835) in the 88 temples of Shikoku (Shikoku Henro).

The traditional way of doing the Shikoku Henro was by foot, but to do the 1200 km of



the pilgrimage requires time and money, that's why some local bus companies of Shikoku have created "package tours" by bus in the 1950s, which provide transport, accommodation and prayer. With the development of the bus tours appears the spiritual guide, sendatsu. The sendatsu, make sure that the scroll is stamped, check accommodation and explain the right way to do the pilgrimage with correct prayer and behavior at the temple, that's why the role of spiritual guide became important and it was officially established in 1965 by the Association of Temple (Reijōkai).

Since the Edo period, for more convenience some miniature replica (utsushi reijō) of this pilgrimage appears in all the country. Nowadays there are even more comfortable "virtual pilgrimages" which, of course, require no spiritual guides. Will miniature and virtual pilgrimages mark the end of package tour and spiritual guides? I would like to present new forms of pilgrimages that replicate Shikoku Henro experience and discuss about the future of pilgrimages.

### ***Cultural events and tourist services Management Model for Tour guiding***

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The introduction of ICT in the tourism sector has generated profound changes in the competitive landscape, allowing overcoming the logic of pure preservation of cultural heritage, in favor of a more efficient action of cultural promotion. Innovation processes can be triggered by management practices, designed to support professionals, enabling: a) an integrated governance of resources and event in a local system; b) simplification and optimization of processes, services, production activities and cultural content distribution.

To that end, there is undoubtedly a need to develop an innovative methodology, useful to manage organizational and critical issues that could emerge during implementation phases of guided tours. This research aims to analyze opportunities that could be made to the tourism sector and to Intangible Cultural Heritage by the application of logics and principles of Business Process Management (BPM) and Product Lifecycle Management (PLM). The objective is to extrapolate a metamodel that provides guidance on how to structure the task force dedicated to organize tours and various events, overcoming the organizational issues that frequently affect the lifecycle of a cultural event or a tourism product. This approach would become very important for replicable events, providing a management information system with historical data for the benefit of future organizational and planning activities.

The paper focuses on the case study "The Ways to Jerusalem: Maritime, Cultural and

Pilgrimage Routes”, an itinerary of cultural and spiritual interest that will link the countries of Central and South-Eastern Europe with Mediterranean countries. The objective is to emphasize and, above all, consolidate the centuries-old historic and cultural relationship between the various regions.

***Fabrication: From Authenticity to Reality and Implications***

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**Keywords:** tour guiding dynamics, tour guiding roles, fabrication, tour guides, tourism system

Also named as interpreters, cultural representatives, cultural brokers, pathfinders and mediators from different perspectives, tour guides have their righteous position in nearly all tourism systems. Despite the importance of tour guides in nearly all spheres of tourism, it will not be wrong to say that the research literature on tour guiding is scant, especially empirical studies with a specific focus on dynamics of tour guiding as proposed by Cohen (1985). Considered among the guides’ roles as proposed by Cohen (1985), “fabrication” is the main theme of this paper. Basically, as a term independent of tour guiding, “fabrication” refers to fake story or information to mislead people. However, this was extended in the context of tour guiding by Cohen’s (1985) pioneering study. This paper sets out to seek answers for to what extent “fabrication” is employed as an instrument in interpretation, for what reason and what role it plays in the performative aspects of tour guides, what the implications of “fabrication” in regulating the ethical codes and sustainability of tour guiding business. The paper follows qualitative research pattern, focus group interview with long-serving tour guides, also delegates at the National Union of Tourist Guides’ Chambers of Turkey. The results on the whole suggest that “fabrication” is embedded in tour guiding and the reasons leading to “fabrication” are not only due to the guides themselves.

## Selected Full Papers

All participants in the IRFGT 2015 were invited to send their papers both to the Scandinavian Journal of Hospitality and Tourism and to the IRFGT organisation, so that full papers could be published in the present publication. From a total of 40 papers presented in the forum, 10 studies reached this electronic book editors. 7 were selected and are presented according to the alphabetic order of the author's family name.

# Tour Guiding Certification: *Quo Vadis?* Conflict of Roles

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## **Abstract**

The main objective of this paper is to ignite a discussion on the challenges in tour guide training dilemmas as well as reviewing the tour guide training paradigm with specific reference to Turkey.

Also named as interpreters, cultural representatives, cultural brokers, pathfinders and mediators from different perspectives, tour guides have their righteous position in nearly all tourism systems. Turkey, a country boasting about rich cultural heritage, is technically faced with a three-fold tour guide education structure, which is practised at (1) two-year associate's degree programs, (2) undergraduate programs and (3) certificate programs, offered by the National Union of Tourist Guides' Chambers. At the end of each program, participants are entitled to be a licensed tour guide, which sparks a fierce debate on who holds the authority. What's more, notwithstanding the fact that tour guiding is offered at tertiary education level, which is governed by the Higher Education Council, National Union of Tourist Guides' Chamber, a trade association, at the legal level assumes the responsibility on legislation procedures ranging from tour guiding regulations to curriculum design, where the conflict gets deeper and deeper. Touching on some global tour guiding education systems, this paper sets out to shed some light on the challenges and issues on tour guiding with specific reference to Turkey and seeks an answer to the question of whether an internationally-adopted curriculum framework is feasible.

## **Keywords**

tour guiding education, tour guiding certification, tour guiding qualification, tourism education, Turkey

## **Introduction**

Tourism has been on the increase for the last sixty years and thanks to its sustained growth and diversification, it has been on the way to becoming one of the most prolific

and largest sectors across the world. Notwithstanding economic turmoil, there has been a significant increase in the international arrivals in 1950, 1980, 1995, 2013 from 25m to 278m, 528m and 1087m, respectively (United Nations World Tourism Organization [UNWTO], 2014).

Coupled with the increase in the volume of the arrivals, it is no surprise that the number of people employed in tourism is also increasing. Considering the case of Turkey, according to a report by Mediterranean Tourist Hoteliers and Operators (2013) on major tourism figures in Turkey, the number of people directly employed in tourism in 1983, 1993, 2003 and 2013 was 218k, 574k, 847k and 1.298m. Although not listed in the top ten international receipt list (12<sup>th</sup>), Turkey holds the sixth place in the list of international tourist arrivals (UNWTO; 2014). It is no more unfamiliar that tourism is of a labour-intensive nature, maybe the most. The very labour-intensive nature makes it mandatory that quality of tourism product is not necessarily related to the goods offered but the quality of service delivery, in which human interaction is indispensable. As Weiermair and Bieger (2005) put it “The quality of the tourism product is therefore not only dependent on the quality of the natural resources tourists ask for, but on the quality of the people working in the tourism industry” (p.40).

Tour guiding is one of the cases in which human interaction reaches its peak. Hence, it will not be wrong to say that the quality perception of customers is directly affected by the composition of the guide and customer(s) interaction. Tour guide in this study is based on the definition by WFTGA (World Federation of Tourist Guide Associations), which says that [a tourist guide is] “a person who guides visitors in the language of their choice and interprets the cultural and natural heritage of an area which person normally possesses an area-specific qualification usually issued and/or recognised by the appropriate authority.”

Besides, considering the unique case of Turkey, tour guides are *sine qua non* in any organized and package tour as stipulated by the law on “Tour Guiding Profession” enacted in 2012 (TUREB), which might herald that a large number of tour guides, considering the tourism potential of Turkey, is needed. In order to train guides so as to meet the future-demand for tour guides in tourism sector, Turkey has a three-fold tour guiding education and training system, unlike, to the best knowledge of the author of this paper, any other country in the world, which are namely certificate programs, two-year vocational higher school and Faculties. In the light of the present situation of tour guide education and training system, this paper aims to critically analyse the issues and challenges in tour guiding training dilemmas besides reviewing the tour guide training paradigm with specific reference to Turkey.

## Background

This part hosts tour guiding education and training structure in Turkey. Basically tour guiding education is operated at certificate program levels and higher education institutes, both of which lead to “certified tour guides” recognized by the National Union of Tourist Guides’ Chamber.

## Certificate Programs

Considering the other alternatives for becoming a licenced tour guide, certificate programs are the fastest and to-the point programs, offering the chance for the potential candidates of tour guides to save a considerable amount of time. Technically speaking, the certificate programs are held by the National Union of Tourist Guides’ Chambers upon the demand by the sector. The law on “tour guiding profession” was enacted in 2012 in Turkey and since then the National Union of Tourist Guides’ Chamber has the control over tour guiding profession across the country.

According to the content of the certificate programs, there are two options, regional and national level. In order to attend the certificate programs, candidates have to go through a 4-stage exam, which is comprised of general culture, foreign language written, foreign language oral, and finally an interview. Any candidate has to pass the four-stage exam in order to attend the certificate programs. As mentioned before, programs are held either at a national or regional level. A candidate attending a national level program is entitled to perform tour guiding in any one of the seven regions of Turkey subsequent to successful achievement of the program. In the case of a regional program, as its name suggests, one is entitled to work within the boundaries of one specific region.

National programs last 700 hours, while regional ones last 150 hours. The lectures offered range from ethics, archaeology to tourism sociology, in a total of 16 courses. Attending the courses does not necessarily guarantee candidates a certificate of completion, hence being a tour guide.

For national level certificate programs, the candidates have to go through two more steps, which are final exams for each subject taken and a 36-day trip across Turkey divided in two parts. In other words, candidates have to successfully finish the final exams and have to attend the 36-day trip across Turkey, after which they have to take an oral foreign language exam of their choice.

For the regional level certificate programs, a similar but shorter procedure is implemented. As far as the regional level certificate programs are concerned, there are

final exams for each subject taken and a 6-day trip within the region where the candidate plans to perform tour guiding.

Subsequent to the achievement of all the procedure, a successful candidate gets his / her licence from the Ministry of Culture and Tourism. After the licence is obtained from the ministry, two modes are at the disposal of a successful candidate, which are “active” or “in-active” status.

In order to perform tour guiding in Turkey, apart from the licence, it is obligatory to have an “active” status, which entails the guide to be registered at one of the professional chambers governed by National Union of Tourist Guides’ Chambers. Then, the guide receives the badge, which gives him the opportunity to enjoy the rights of being a tour guide.

On the other hand, after obtaining the licence, if “in-active” status is preferred, then it is not mandatory to be registered at one of the professional chambers governed by the National Union of Tourist Guides’ Chambers. However, in this case, one is not entitled to perform tour guiding activities, unless he/she changes the “in-active” status to “active” status.

As a matter of fact, the only prominent difference between “active” and “in-active” status lies in whether one is registered in a professional tour guiding chamber located in each region.

### **Higher Education**

According to the recent data obtained from the Council of Higher Education of Turkey (CoHE), an autonomous institution, the present number of universities in Turkey is 181, 108 state-run and 73 foundation-run. The total number was 75 in 2004, 24 foundation and 51 state universities. What’s more, irrespective of the type of the university, they offer associate’s degree programs (two-year), Bachelor’s degree programs (4-year), Graduate and Post-graduate programs, ranging from two to four years depending on the specific program offered (YOK, 2015). There is a dearth of international literature on higher education tourism programs in Turkey (e.g. Brotherton, Woolfenden, & Himmetoglu, 1994; Korzay, 1987, Okumus & Yagci, 2005; Guzeller, Yıldız, & Sonuc, 2009; Gunes, Karakoc, & Bastemur, 2012). Among these, Okumus & Yagci (2005) perform a very detailed examination of tourism Higher Education in Turkey, starting from the history of tourism education in Turkey to the structure of tourism higher education, giving information on the number of students by tourism-related programs, curriculum, trends and problems faced.

However, to the up-to-date knowledge of the author of this paper, there has been no international literature on tour guiding system and education in Turkey. Tour guiding education at Higher Schools (Universities) in Turkey is organized at Associate's and Bachelor's degree programs. Although graduate program admissions have recently been recognized by CoHE, presently no graduate programs admit students in tour guiding. Table 1 reports some statistical data on the number of programs at Associate's and Bachelor's level along with new admissions.

**Table 1.** Number of Programs and New Admissions in 2014

Program	Number	Number of New Admissions
Associate's	14	780
Bachelor's	15	885

Source: Author's own elaboration from OSYM [Measurement, Selection and Placement Center] (2014). 2014 Ölçme Seçme ve Yerleştirme Merkezi, Merkezi Yerleştirme ile Öğrenci Alan Yükseköğretim Önlisans / Lisans Programları, Ankara.

On the other hand, Table 2 reports the same statistical data for the year 2007.

**Table 2.** Number of Programs and New Admissions in 2007

Program	Number	Number of New Admissions
Associate's	16	1198
Bachelor's	6	347

Source: Arslanturk, Y. (2010).

It is clearly seen that the total number of programs (both associate's and bachelor's) increased from 22 to 29 (31%) and the number of new admissions increased from 1545 to 1665 (7%). It is well understood that in order to meet the ever increasing demand for tour guides, presently 29 tour guiding programs offer education at both associate's and bachelor's degree level.

What's more, according to the law on "tour guiding profession", in the event that any university graduate, no matter what department, takes Master's courses in the department related to tour guiding, then the path to become a tour guide is open as it is for Associate's or Bachelor's degree students.

Nevertheless, a successful completion of whether a Bachelor's or Associates or Master's degree in tour guiding does not mean that you can enjoy all the privileges a guide does. Since the National Union of Tourist Guides' Chambers is the superordinate body related to tour guiding in Turkey, university graduates have to take 36-day or 6-day trips, based on their preference over nation or regional tour guiding and have to prove that they are proficient in at least one foreign language.



A successful completion of the field trips and the proficiency in a foreign language together mean a licence. Following this the same procedure is applied as mentioned in the certificate programs related to “active” or “in-active” status.

### **Issues and Challenges**

Owing to the swift development in the number and different tourism education and training programs, what is appropriate and effective in tourism education needs careful consideration (Cooper, Shepherd, & Westlake, 1994).

In countries like Turkey, which could be listed among the developing countries, it is plausible that tourism supply should be under some control in order to prevent uncontrolled development. Different countries have different tour guide training systems depending upon their economic and social structure. According to WFTGA, in the United States, tour guiding is not possible without an appropriate licence recognized by authorities, while it is possible to perform tour guiding without a licence in some States. The examples can be enumerated. As Chowdhary and Prakash state “... [Tour guiding] is handled directly by the ministry or its agencies; in others it could be the trade association or the approved institutions, or in some cases universities and colleges can offer this training independently” (2009, p. 167). In short, every country has its own institutional mechanisms for tour guiding licensing.

Given the present state of the tertiary education and the certification programs held in Turkey in the field of tour guiding, the system is one of a kind across the whole world based on the following reasons.

### **All roads go to tour guiding**

The striking difference between how tour guiding is handled in other countries and in Turkey is total. To the best of our knowledge, there is not even a single country like Turkey, where tour guiding is offered at tertiary level within degree programs. Besides, in the forthcoming years, tour guiding will be offered at graduate and postgraduate levels, which could be a never-before-seen case.

The question is whether tour guiding could be integrated within university programs and hence curriculum should be a matter of comprehensive and in-depth analysis as well as discussions between academics and those involved closely in tour guiding business. This is definitely not the case in Turkey. The figures in Table 1 and Table 2 make the issue much clearer. The number of bachelor degree programs in 2007 was 6, while it is 15 in 2014, according to the data from OSYM. Related to this, Ayşe Başı Collins in her “Adding a Course to the Curriculum? Dilemmas and Problems” (2005) talks about “knee-jerk implementation of curriculum without study, understanding, proper

implementation and follow-up..." (p. 60), which could be put down to as a reason why there are so many bachelor degree programs in tour guiding. What's worse, the number of degree programs is expected to rise.

### **Widget Theory**

Peter T. Flawn, the present president of University of Texas at Austin, in the remarks he gave in San Antonio in 1979, proposes "the widget theory of higher education" in an ironic manner. He held that

a college or university is a manufacturing enterprise that produces products called academic degrees in basically the same way as a company such as Universal Widgets, Inc. produces widgets. Like widgets, academic degrees come in several models and price ranges. They are known as baccalaureates, masters, and doctorates... Under the theory, over-production of degrees is also very bad. A college or university that produces a degree for which there is no job is not cost-effective and obviously not well managed (p.1-2).

With specific reference to the case of Turkey, it could be argued that "the widget theory" applies in Turkey with the number of degree programs. According to the recent data obtained from the National Union of Tourist Guides' Chamber, the number of tour guides with "active" status is 7400, while those with in-active status is 9700. This number is expected to rise with new graduates. Although no recent statistical data exist for now, according to a study by Arslanturk (2003), travel agents show no preference (95%) over tour guides who hold a university degree or a certificate, which is another point to mention. In other words, 95% of the then travel agents stated they do not discriminate tour guides based on their training or educational background.

### **Certificate Programs**

Certification in professional contexts is referred to as "formal recognition of professional or technical competence" (Lysaght & Altschuld, 2000). If one needs to be certified, the degree of technical or professional competency has to be ascertained. Certification in the context of tour guiding is a legal requirement. That is to say, without going through a certification process, it is not viable to be entitled to work as a tour guide. The certification process was mentioned elaborately in the preceding sections.

As Pond (1993, p. 94) states, certification is voluntary and administered by professional organizations, while licencing is mandatory by law and granted by government bodies.

Since 1980, long before universities started to offer degree programs in tour guiding, certificate programs have been commenced in order to meet the market demand for tour guiding. Despite the potential labour market offered by universities by means of degree programs, certificate programs are still in use.

With this respect, it will not be ungrounded to hold that certificate programs are a way of offering a short-cut path leading to tour guiding. At one hand, as mentioned before candidates have to take 700 hours, which were around 500 hours two years ago; on the other hand, those attending universities have to take around 2000 hours. Which one would you choose? Where is justice in that?

### **Who's got the power?**

Another important issue to mention is the authority problem. As mentioned before, National Union of Tourist Guides' Chamber is a superordinate body, under which there are 13 regional chambers. Issued in 2012, the law on "tour guiding profession" drew negative reaction from universities since it enables the National Union of Tourist Guides' Chamber to act as a higher education council and to take decisions without the participation of universities across Turkey. To illustrate, before the law, universities used to arrange the 40-day field trips on their own subsequent to the approval of the Ministry of Culture and Tourism. This offered the universities many opportunities ranging from the dates of field trips to negotiating power against the travel agency. However, following the law, the costs increased tremendously and universities have lost their ability in flexibility and negotiating power.

A simple analogy might be useful to explain the depth of the problems. Consider a Bar Association. There are supposed to be lawyers with a degree in Law. However, in the case of the National Union of Tourist Guides' Chamber, most of them are tour guides who attended certificate programs. Without much involvement in university, it could be argued that it sounds unreasonable that the National Union of Tourist Guides' Chamber is able to act as a superior body, breaking the hierarchy and leading to conflict of roles in job entitlements.

### **Conclusion**

This paper has sought to critically examine and analyse the issues in tour guide training dilemmas as well as reviewing the tour guide training paradigm with specific reference to Turkey. Tour guides are given a wide variety of titles ranging from interpreters, cultural representatives, cultural brokers, and pathfinders to mediators from different perspectives. No matter what the situation is, tour guides have their indispensable position in nearly all tourism systems. Turkey, a country blessed with rich cultural

heritage, is technically faced with a three-fold tour guide education structure; which is practised at two-year associate's degree programs, undergraduate programs and certificate programs, which take 700 hours, offered by the National Union of Tourist Guides' Chambers. At the end of the program, participants are entitled to be a licensed tour guide. What's more, notwithstanding the fact that tour guiding is offered at tertiary education level, which is governed by the Higher Education Council, National Union of Tourist Guides' Chamber, a trade association, at the legal level assumes the responsibility on legislation procedures ranging from tour guiding regulations to curriculum design, where the conflict gets deeper and deeper.

This being the case, urgent measures should be put into practice in order to maintain the sustainability of tour guiding in the long run and coordination is a must among the institutions involved in tour guiding profession. For the better prospect of tour guiding profession, rather than being perceived as a profession of leisure times, the profession should be turned into a career profession. It is believed that only in this way can the profession be sustainable and considered as a career profession.

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# Psychogeographical counter tour guiding: Theory and Practice

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## Abstract

In this paper, will be outlined and explained a mode of tour guiding referred to as 'psychogeographical' counter-tour guiding that has been conducted in Manchester, Huddersfield and Leeds with groups such as the Huddersfield Psychogeography Network, the Loiterers Resistance Movement and the Leeds Psychogeography Group. The usage of psychogeography here draws on elements of the situationist practice of playful wandering without destination in order to: experientially make sense of and creatively engage in group dialogue about the changing form of towns and cities and to creatively consider what sort of societies we would really like. In doing this type of counter-tour guiding, it will be explained how the author's methodological approach to this work is conceptualised as a psychogeographer, counter-tour guider and as a critical psychologist drawing on situationism and reflexivity theories. Connection will also be drawn with other individual and groups doing similar adventures and journeys such as Walk Walk Walk, Wrights and Sites and also the Manchester Area Psychogeographic. Key analytical data and conclusions to the work will also be discussed.

## Keywords

psychogeography, counter-tour guiding, walking

## Introduction

In this paper will be explained an approach to counter-tour guiding that draws on elements of situationist psychogeography. Key concepts will be discussed including psychogeography, counter-tourism and critical psychology. Those are the three main areas, which are the foundations to this approach in counter-tour guiding and it will be explained how this can be mapped in relation to conventional tour-guiding practice. In this paper will also be discussed some recent counter-tours that have been conducted as well as providing some critical reflections on past work and this will be concluded with consideration of future plans (Bridger, 2011, 2013 and 2014).

It is necessary to begin with the necessary question of how to define counter-tour guiding and why it is a different approach to conventional tour guiding. A key book on this topic is *The Lonely Planet Guide to Experimental Travel*, written by Antony and Henry (2005). This particular book provides a range of fun, playful and creative activities which can be used to engage with, explore and experience things in quite different ways to that which would be suggested in more conventional guides offered by Lonely Planet and other book series such as the Rough Guides. The Lonely Planet Guides to places such as Portugal, Amsterdam and New York would tend to highlight important landmarks, places to eat and shopping districts and readers would be directly 'guided' to these places with maps and address information. Whereas Antony and Henry's (2005) book does not aim to orientate its readers in particular places nor does it aim to give historical, cultural and social information about various environments. Rather it aims to provide its readers with various gaming strategies, which can be used to creatively explore different places. This then brings focus to what should be considered as an important part of making sense of places and that is the question of doing tours and what sorts of changes that can be enabled. For most people, wandering around new places is an enjoyable pastime and it is why tourism is such a popular activity in that it is a break from work and enables people to enjoy some 'down time' from the humdrum of day-to-day work and other obligations.

In critical and feminist psychology, the use of the 'I' position and reflecting on our roles in research is crucially important (Holloway, 1989). In my work as a critical psychologist, the idea of linking reflexivity with political practice is of crucial importance (Parker, 2007). Indeed, I position myself as a 'critical' psychologist, which means that I aim to be critical of the discipline of psychology and what it does in both its research and in terms of the productive effects in everyday contexts such as the workplace, education and health. In considering the relations of my position of psychology in relation to place, I have explored the environmental psychology and social psychology research. However, in both those areas of research, I have been discontented with the lack of a political analysis of places and in my recent work, I have argued for how and why a 'politics of place' is important. Indeed, in much of the research in critical psychology, it often means drawing on work from outside that discipline. In relation to my study of places, I have drawn on work from other disciplines such as feminism, cultural geography and politics as well as from outside academia.

In considering the value of work outside not just psychology but of academic work in general, this brings necessary focus to the work of the situationists and their practice of psychogeography (<http://www.cddc.vt.edu/sionline/>). They were a group of radical intellectuals, artists and activists that were opposed to the capitalist gentrification of towns and cities and they conceptualized what is known as a psychogeographical approach. In the words of Guy Debord (1955), the leading member of the Situationist

International, he explains that, 'Psychogeography could set for itself the study of the precise law and specific effects of the geographical environment, consciously organised or not, on the emotions and behaviours of individuals.'

The core aim of their work was to enable people to stop identifying with routine modes of behaviour and to create ways, which would help people to break out of standardized modes of thinking and movement. In the works of Kotanyi and Vaneigem (1961), they argued that the first task should be to 'enable people to stop identifying with their surroundings and with model patterns of behaviour'. However, in presenting the work of the situationists and their psychogeographical approach it is important to avoid simply replicating their work and arguing simplistically that their way would be most appropriate to undertaking studies of particular places. It is important to consider the extent to which their work is useful and applicable to the contemporary context, to see what other work has been produced in recent years and then to consider what further work needs to be done. These debates and questions have been addressed in recent years by various psychogeographical inspired individuals and groups such as Iain Sinclair, Will Self and other groups such as the Manchester Area Psychogeographic, London Area Psychogeographic, the Loiterers Resistance Movement, Leeds Psychogeography Group and the Huddersfield Psychogeography Network. Indeed, a recent edited collection of papers by Richardson (forthcoming) highlights a variety of approaches to psychogeographical work in the United Kingdom. This text complements the rather London-centric, but still most excellent introduction to psychogeography written by Coverley (2006). In a recent project by Iain Sinclair and Andrew Kotting (2012), they undertook a biographical journey from Hastings seaside to Hackney in London via the English waterways on a swan pedalo. The point of such activities is to explore the geographical and psychological effects of the changing form of places but what differentiates this from environmental psychology or other similar related research areas and disciplinary approaches is that the aims are to carry out a radical political analysis of places with a view to considering alternatives to the capitalist order of things. In other writings by the situationists, they referred to strategies such as the *dérive* (Debord, 1958), which is a method of wandering around places in order to chart the changing form of environments and to explore the effects of environments on individuals. Also, situationists such as Debord and Wolman (1956) referred to the concept of *detournement*, with the aims being to take existing mediums such as text, photo and film and altering and subverting the original intended meanings. *Dérives* and *detournement* were meant to lead to the creation of situations, with such situations leading to what would be revolutionary social change. This obviously is quite a grand aim and difficult to achieve though ultimately, the situationists believed that real social change would take place by people rather than by leaders. At the very least, it would be useful to consider the political implications of tour guiding and the extent to which it is useful and important to link such practice with social change.



At this point, it is important to discuss some recent psychogeographical counter-touring work, conducted in Manchester city centre. It is necessary here to revert to the 'I' position to explain how this research was conducted, as I want to be transparent in the claims made and to evidence my role in this work. At this stage in drawing on psychogeographical work in my tour-guiding practice, I was very new to the approach of situationist psychogeography and so I was basically using that approach as close to how it was originally used by the situationists. In order to do that, I referred to key situationist papers on psychogeography such as Khatib's (1958) account of the Les Halles district in Paris and also Debord's work (1958). These works can be considered as exemplars of psychogeography work and so what will now be discussed is a 'methodological' approach to the work conducted in Manchester.

### **A 'Guided-Tour' of a Psychogeographical Method**

I chose to conduct the first psychogeographical project in Manchester for two reasons, with the first reason being ease of access as it was where I was living and studying at that point in time. The second reason was that this project was part of my PhD thesis where I was analysing representations of terrorism as well as using psychogeographical methods to investigate the site of Ground Zero four years after the September 11<sup>th</sup> 2001 attacks. So for the second reason, it made sense to undertake a pilot study in Manchester in order to test out how a psychogeographical project would work in practice. Manchester city centre had also experienced an Irish Republican bomb attack several years earlier and since that time much of the central areas of that place had been rebuilt and redesigned with new shops, restaurants and bars. So in terms of the next steps in designing the psychogeographical study in Manchester, I then decided on key themes for exploring that place and decided to consider surveillance and control (closed circuit television cameras), consumerism and capitalism (layout of the shops in the aftermath of the Irish Republican Army bombing) and the historical context of Manchester, i.e. the Peterloo Massacre. With the themes decided on, I chose the particular exploratory approach that I would use which involved a dice walk. Using a six sided dice, I replaced the numbers on the dice with directional indicators such as 1=go straight on, 2=take the first left and so on. The use of the dice was meant to provide an exploratory, random feel to wandering around Manchester city centre. It should be noted at this point that in qualitative psychology research we often use research questions to underpin our work, so I decided to conceptualise some questions which were based on Khatib's work (1958): what does it feel like where I choose to walk? How do I engage with my surroundings? Do I notice any changeable ambiances? What do I think needs to be changed in the environment? What should the environment look like? These questions were designed to explore my personal, affective responses to environments as well as to consider what I think needed to be changed in the

environments in terms of thinking beyond the ordinary capitalist order of things in society. The latter questions are of course, rather utopian in nature though that is precisely the aims of situationist psychogeography in that it is not simply about exploring how we feel in particular places but it is about understanding and working out what we think needs to change in society. So the aims are rather more political than conventional tours in that we are using the mode of wandering to explore formations of space and place, which lay beyond the current capitalist order of things. Such work is quite different to conventional tour guides that operate in Manchester city centre such as the Manchester Guided Tours (<http://www.manchesterguidedtours.com>) where fixed routes are taken in the city to explore various histories such as the relations of the cotton industry to slavery and the symbolism of street names. The other part of such project work is to produce analytical data and conclusions, and it is this to which will be turned to next.

### **Analysis and Conclusions**

In previous psychogeographical work produced, this has been written in form of first person narrative accounts, which are interspersed with photographs and poems (see Bridger, 2011, 2013 & 2014). In relation to the Manchester psychogeography study, the themes of privacy and consumerism and also surveillance and control were drawn on to inform an account of that walk. This account was based on ideas such as spaces of inclusion and exclusion, i.e. drinking zones and no skating as well as the idea of all public spaces as being consumer spaces, i.e. that there was limited scope to engage in non-consumer activities. In that work I take readers on an account of the psychogeography walk that I conducted (Bridger, 2013). It is important to consider what the implications are of psychogeographical counter-tour guiding and what sort of future work needs to be done in this area. First of all, it is important to conduct work, which critiques the form, function and use of neoliberal environments. Secondly, much of the current research in the social sciences does not directly focus on the political analyses of environments and thirdly, it is necessary to connect research with political practice and social action. Arguably, there are interesting and relevant connections that could be made with participatory methods, counter-tour guiding and psychogeography. However, this would require re-theorising various concepts and practices such as situationist theory and psychogeography to make it fit with the current political order of things (Bridger, forthcoming). Finally, it is important, to continue with teaching, writing and with further psychogeographical counter-tour guiding events and with various plans for the future rebuilding efforts in towns and cities. An interesting example here is regarding a recent consultation process with Stockholm residents using the Minecraft computer game, where some members of that community were asked to redesign that city as to how they would like that place to look like (<http://www.blockholk.com/participate>). These sorts of consultation processes are

crucially important as ways to enable communities to envision what sorts of environments they really want. It should be an aim to consider what we want tourism studies to do for us and to consider what environments we really want to live, work and play in.

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**Lisbon (e)motions: A survey on the experiences  
of group travelling tourists, based on the information given by their guides**

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**Abstract**

Tourists recently awarded Lisbon as the best city break destination in Europe. This article analyses the types of experiences tourists have travelling in the city of Lisbon when they are advised by their guides about what to do or visit. The research method is the questionnaire, aimed at investigating the choices of tourists in the area of mobility, their perception of the quality of life and their level of appreciation of neighbourhoods, landmarks and infrastructures. Conclusions state that there is an obvious link between the quality of life and the quality of the tourist experience but it is difficult to measure it. Through this questionnaire, we hope to have made a small contribution to the understanding of the perceptive sphere of the tourist and his choices in terms of behaviour, which are an essential element of any strategy for tourism marketing.

**Keywords**

Lisbon, questionnaire, guided tours, quality of life, perception.

## 1. General Framework

“Lisbon - modern resort region with a unique diversity and authenticity associated with its history and human scale, which allows a wide range of multiple experiences throughout the year - a safe city, which enjoys a mild climate and a bright light.”

*(Plano Estratégico para o Turismo na Região de Lisboa, 2014<sup>1</sup>)*

Is Lisbon becoming a mass tourism destination?

The large number of tourists in the last season activated the discussion among academics about the capacity of Lisbon to stand the impact of the industry of leisure.

The question above must be asked now, before it's too late, because Lisbon is going through deep changes, although it is particularly sensitive to commodification. The interest of the capital of Portugal lies not only in its human scale, its unique geographical position, its relaxing waterfront, its beautiful monuments and its varied landscape, but also in its traditions, such as the nostalgic *fado* music and its delicious gastronomy, in the individuality of its old districts, such as the Alfama, Mouraria and Bairro Alto and in its warm Mediterranean people. Lisbon is also a city of contrasts: modern and old; fast and slow; excessive and humble.

Its nature and culture are perhaps one of the reasons why it has won several tourism prizes in the last few years. Lisbon was once again distinguished internationally, this time as the “Second Best European Destination” and also secured the distinction of ideal destination for urban getaways.

Ashworth and Tunbridge (1990) state that urban tourism resources can be divided into primary attractions that attract tourists directly (museums, monuments, places of historical interest, events and urban landscape) and secondary attractions that would not justify the trip alone but globally contribute for the formation of a positive image of the city (cafés, restaurants, hotel service standards, a good business network, entertainment, etc.). The combination of the two types of resources will probably be the main factor of attraction of urban tourist destinations. In the city converge individuals with different tastes and interests attracted by the image of a place of grandeur and abundance of wholeness and freedom, luxury and permissiveness.

On the other hand, tourism tends to focus today on the imagery, ornamental and scenic dimensions of the city, which defines a new reading of the urban space as a place and object of consumption, leisure and recreation, therefore fading the conception of a

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<sup>1</sup> *Lisbon Tourism Strategic Plan*, Roland Berger, 2014

business and labour site (Rodrigues, 1992). Another image of great tourist interest is connected with the geographical position of the city, as well as with its scenic effect due to the numerous hills and their proximity to the river. This is actually an extremely valued item by written guides (Henriques, 1996).

Table 1: Evolution of the main hotel indicators  
From January to November 2014  
Lisbon Metropolitan Region

	Value	Variation %	
<b>Total</b>			
Guests	4.583.795	13,2%	?
Overnights	10.885.217	14,8%	?
Income	639.802.424	15,4%	?
<b>External Markets</b>			
Guests	3.154.654	13,8%	?
Overnights	8.315.254	15,2%	?
<b>Domestic Market</b>			
Guests	1.429.141	11,8%	?
Overnights	2.569.963	13,5%	?

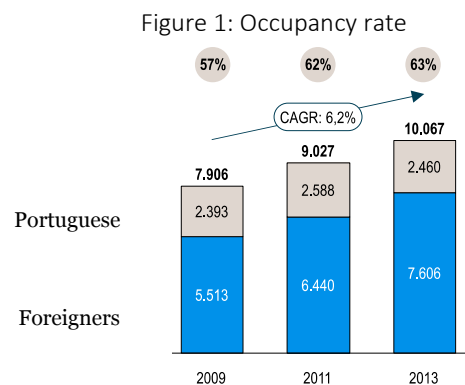
Table 2: Market growth - overnights  
From January to November 2014  
Lisbon Metropolitan Region

	Value	Variation %	
<b>Spain</b>	1.089.153	11,1%	?
?	754.540	12,9%	?
?	627.697	35%	?
?	394.578	3,3%	?
<b>France</b>	976.468	30,2%	?
<b>Holland</b>	283.378	-0,3%	?
<b>Scandinavia</b>	446.311	4,4%	?
<b>USA</b>	444.104	0,9%	?
<b>Brazil</b>	781.282	10,4%	?
<b>Russia</b>	233.496	-6,6%	?

Source: Observatório do Turismo de Lisboa n.133 (2015), p. 3

“The year 2014 was a year of records for the Portuguese Tourism” (*Observatório do Turismo de Lisboa*, n.133, 2015). According to tables 1 and 2 all indicators are positive (except the decreasing number of tourists coming from Holland and Russia). Table 1 shows there were more than 10 million overnights, which represent a growth of 14.8% comparing to 2013, an income of more than 600 million euros. Most of the guests visiting Lisbon are foreigners representing almost 80% of the market.

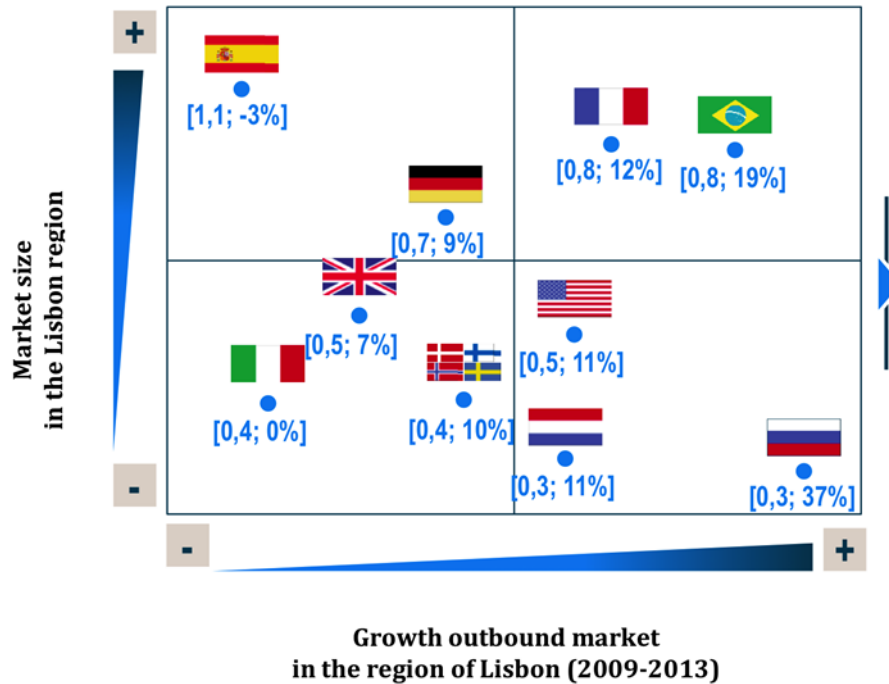
Table 2 shows that most tourists come from Spain, France, Germany and UK. Four markets have grown over 10% in 2014: France (30,2%), Germany (12,9%), Spain (11,1%) and Brazil (10,4%).



Source: Plano Estratégico para o Turismo na Regional de Lisboa 2015-2019 (2014), p. 11

According to the *Plano Estratégico para o Turismo na Região de Lisboa* (2014), overnights in Lisbon are increasing over 6% a year since 2009. The European markets are the most important ones in the region of Lisbon, as stated before, representing 55% of the total number of tourists. The majority of the tourists who come to Lisbon in city/short breaks are aged between 35 and 54.

Figure 2: Relative weight of source markets in Lisbon vs. growth



Source: Plano Estratégico para o Turismo na Regional de Lisboa 2015-2019 (2014), p. 12.

Figure 2 allows us to outline a couple of comments: The European markets that are growing the most since 2009 were France (12%) and Holland (11%), while Spain and Italy are decreasing. As far as non-European markets are concerned, Brazil reached the top (19%) and USA (11%) is also growing but Russia (37%) had the highest growth since 2009.

The region of Lisbon is more and more defined by the diversity of its supply: culture, MI, gastronomy and wine in Lisbon, Sintra and Cascais (where golf, health and by the sea tourism - 7<sup>th</sup> best destination in Southern Europe - can also play an important role). The outskirts of the capital are developing nature and wine routes (Arrábida), nautical and equestrian tourism, bird watching (Tagus region) and surf (Mafra and Almada). More than 50% of the tourists visiting Lisbon usually decide to complement their stay touring in the region.



Lisbon has always been thought as a whole tourism supply, but according to the new strategic plan, it should be divided into different tourism areas, each one with its own identity:

- Bairro Alto, Cais do Sodré and Santos districts – Lisbon for young people (nightlife, gastronomy and wine, boutiques and ateliers);
- Baixa-Chiado districts – Trendy Lisbon (new museum dedicated to the Portuguese discoveries should be inaugurated at Ribeira das Naus);
- Alfama, Castelo e Mouraria – Historical Lisbon (better access and itineraries should be designed);
- Avenida Liberdade and Marquês de Pombal – MI and shopping Lisbon (a Congress Centre for over 5000 people should be built);
- Belém – Museum district (paths should be better signed, one ticket for all monuments should exist, a new Belém brand should be promoted and festivals should be organized);
- Parque das Nações – Modern Lisbon (space for families and children).

The enlargement of the supply into 16 products includes those that already exist (city breaks, MI, cruises, golf, religious tourism, residential tourism, surf, wine tourism) and new bets (nautical, health, bird watching, equestrian tourism, nature, by the sea, snorkelling, adventure, culture, gastronomy, shopping, nightlife). Lisbon wants to be recognized as the best European destination in terms of diversity.

After researching how the Lisbon experience affects the independent tourists that visit the town (*Lisbon Experience. Mobility, Quality of Life and Tourist Image: a Survey*), we now concentrate ourselves in the guided tours, i.e., groups of tourists who come to Lisbon.

Therefore the goal of this paper is to understand the perception that tourists traveling in group have of the space and culture of Lisbon, its image and the places they visit, the whole perceived through the filter of tourist guides. In our time the tourist image as a consumer of tourist space and memories of an ethnic group prevails. To consume them, tourists damage them often irreparably. However, visitors are entitled to make use of this space and these memories, but the host society also has the right to preserve its space and memory. In this perspective, tourism brings economic benefits, but also social divisions and property damage resulting, among other factors, in the loss of authenticity.

However the mediation of guides is essential for both parties in order to maintain this unstable balance so that actors don't end up in a conflict that after all is negative for everyone. Thus, the guide must play his/her role of ambassador, cultural negotiator and

leader and protect the tourist as a consumer and the target host community from excessive consumption.

Therefore, the guide is a two-way bridge between the tourist and the host community, providing dialogue between the parties and avoiding misunderstandings that may arise from both language barriers and cultural differences. In this sense, the guide guarantees the tourist wellness in the destination, minimizing the negative impact on the tourist life and the daily life of receivers.

Pond (1993) draws attention to the lack of sensitivity of many tourists and the pressing need that in recent years has been called responsible tourism: "If there is a need for more responsible tourism practices, we can say that the guides have in this matter much power, promoting a more socially responsible behaviour among visitors. In fact, travellers look for more than interpretation in their guides. They require guidance on how to interact with a new region and its inhabitants" (Pond, 1993: 231).

In the case of Lisbon, the standard guided tour includes a drive along the main avenues (Av. da Liberdade) and squares of the centre (Marquis of Pombal, Restauradores, Rossio, Praça do Comércio), a walk in the old Alfama quarter and the drive in the museum district – Belem – with the visit of Jeronimos Monastery, and two stops at Belem Tower and the monument of the Discoveries. Obviously, the city tour just gives a general impression of Lisbon. Hence, the tourists get a (partly) "second hand approach" to the destination and see the city through the eyes of their guide.

The professional tour guide should recommend ethical and responsible tourism attitudes suggesting to tourists contact with local people wherever possible; explaining local customs, if different from the tourists habits; reminding tourists that they should keep the area clean and can participate in recycling; maintaining respect and dignity towards all, especially in places of worship and giving good examples of this attitude.

This line of thought is supported by the International Cultural Tourism Charter (ICOMOS, 1999), which supports programs of training and employment of guides- interpreters recruited within the host community. The aim would be to develop their presentation skills of local values, promoting simultaneously the knowledge and respect for the heritage itself and directly involving the host community for their protection and conservation.

Basically, there is no question about the nationality of the guide, but his/her identity, culture and values. If the guide belongs to the host community he/she can better than anyone transmit the local culture; on the other hand, to minimize the impact of tourism

on the host community, job creation should use, preferably, the elements of the local, regional or national community.

In this paper the participation of tourist guides was crucial. These professionals distributed 300 questionnaires to their groups of tourists of several nationalities, from May to December 2014. The results state that the group visitors' perception of Lisbon is quite superficial and incomplete, although tourist guides do sell the city and its beauties.

Which are the predominant markets in Lisbon? How is the structure of the demand? And how is the supply organised? Which are the tourists' interests and the most visited attractions in the city? What forms does the mobility of tourists assume? What are the most requested experiences? And which of them are more experienced?

These are some of the questions we will try to answer in this study.

## 2. The questionnaire

### 2.1. Introductory remarks

Assuming that "the choices and behaviours of tourists in the area of mobility, their perception of the urban reality and their level of knowledge and appreciation of neighbourhoods, landmarks and infrastructures could not be known except through the administration of a questionnaire" (Brito and Zarrilli, 2013: 5-6), we have decided to apply the same method that was adopted for the first phase of the research – the case of independent tourists - to the present case. As aforementioned, a questionnaire has been administered to a sample of 300 foreign group tourists who visited the city of Lisbon between May and December 2014.

The questionnaire has been compiled in 6 languages (English, French, Italian, Portuguese, Russian, Spanish) and consists of 5 sections:

1. *General information* – individual characteristics of the respondent, such as age, gender, nationality, number of visits already carried out, means of transport, type and level of accommodation.
2. *Guiding* – assessment of the quality of the information provided by the guide, with particular relation to the subjective knowledge and perception that has been achieved and experienced by the tourist through, and thanks to, this latter (curiosity, interest, impact on personal life, desire to come back, etc.).

3. *Tourist mobility* – use of various forms of urban transportation, purchase of the daily urban transport ticket, hire of means of transport such as car, bike or scooter.
4. *Quality of tourism and quality of life* – level of appreciation, on a scale from 1 to 5, of the characteristics that define the quality of urban life, such as cleanness, traffic, cultural life, together with those of closer importance to tourism, such as tourist services and crafts.
5. *Tourist experience* – level of knowledge and appreciation, on a scale from 1 to 5, of (a) already established and potential tourist areas, (b) public services and infrastructures frequently used by tourists, or those that can be seen as urban landmarks of tourist interest, thanks to their visibility and / or to their aesthetic characteristics.

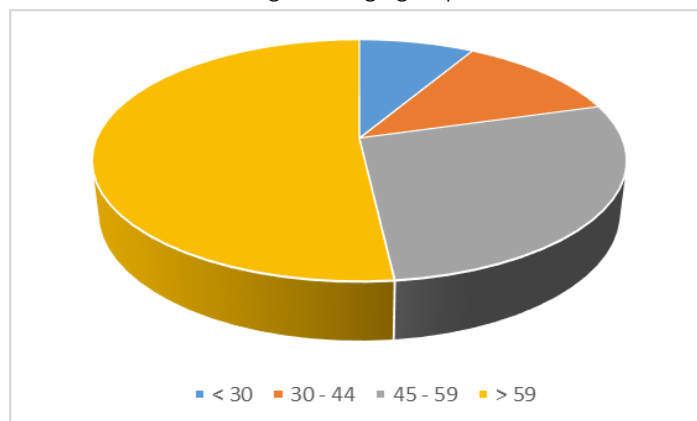
## 2.2. The results of the survey

2.2.1. *General information* - Predictably, the sample of tourists involved in the survey is quite homogeneous in terms of age, habits, preferences, and taste. Unlike independent tourists, whose features can diverge dramatically, group tourists belong to a more specific and definable market segment: motivations and attitudes can be quite similar even in presence of different cultures and income levels. All this emerges from the results of the questionnaire.

A first interesting remark is connected with the gender: almost 60% of the respondents are female. To a certain extent, this predominance of women could be just a random result, not to be taken into consideration. Nevertheless, life expectancy is much higher for women than for men (up to 5 years). Furthermore, in our opinion it cannot be excluded that the market segment consisting of middle aged and elderly women – especially those inclined towards guided tours – perceive the city of Lisbon as a proper and fascinating destination in terms of climate, safety, atmosphere, comfort.

This leads us to the second – foreseeable – remark (Fig. 3): 51.7% of the respondents is more than 59 years old, while another 27.8% is aged between 45 and 59. Consequently, only 20.5% of the respondents are less than 45 years old.

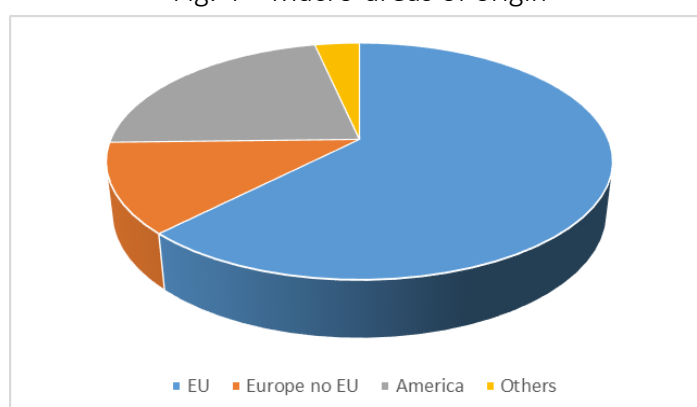
Figure 3: Age groups



Source: authors, 2014

As for the origin of the tourists (Fig. 4), EU citizens as a whole represent 62.3% of the sample, coherently with the international tourist figures for the city of Lisbon. However, the internal composition of EU nationalities involved in the survey doesn't match the official statistics: there is an over-representation of the Italian component (30% of the total), probably due to the professional connections of both the authors and the tourist guides who administrated the questionnaire, while other EU countries generating major flows towards Lisbon are under-represented (Spain, 8.7%; Germany, 10.7%; UK, 6.3%;) or absent (France). Other (not EU) European countries account for a 12.3% in total (among them Switzerland, 7.3%, and Russia, 3.7%). Therefore, the total for Europe is 74.6%. Outside Europe, only the American tourists reach a considerable presence in the sample: 22% in total, in line with the official figures and with the leading role of USA citizens (11%), followed by Brazilians (6.7%). Finally, Australians represent 2.7% of the sample.

Fig. 4 – Macro-areas of origin



Source: authors, 2014

The great majority (67.5%) of the respondents stayed in Lisbon between 2 and 4 nights, 24.6% more than 4, while only 7.9% stayed 1 night. 76.7% of the respondents were visiting Lisbon for the first time. Among the others, 45.6% had already visited Lisbon

once and 28.8% twice. Hence we can assume a quite high degree of loyalty to the destination, also granted by the huge diversity of the tourist supply that is available in the city of Lisbon. 83.7% of the respondents arrived by plane, with a significant minority of tourists (11.7%) arrived by bus, mainly from Spain. Virtually the entire sample (97.7%) stayed in hotels, most of which hi-level (61.1%, 4 star; 29%, 5 star).

2.2.2. *Guiding* - The level of satisfaction with the information provided by the guides is undoubtedly high: in 7 out of 9 cases more than 70% of the respondents answered positively to the questions related to guiding (Fig. 5).

In detail, the guides' information:

- 1) made 96% of the respondents consider to recommend Lisbon to relatives and friends;
- 2) made 93.3% of the respondents curious about the city;
- 3) made 93% of the respondents wanting to talk about their tourist experience;
- 4) made 86.7% of the respondents<sup>2</sup> eager to come back, coherently with what has been observed above about the loyalty to Lisbon as a tourist destination;
- 5) enabled 84.7% of the respondents to visit the city on their own;
- 6) made 84% of the respondents feel responsible towards the heritage;
- 7) was connected with the interests of 79.3% of the respondents;
- 8) motivated 69.3% of the respondents to buy a souvenir;
- 9) had some impact on the personal life of 44% of the respondents.

Such a good result reveals the high professionalism of the guides who administrated the questionnaire, but at the same time demonstrates the positive emotional involvement of the tourists and their desire to share the experience.

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<sup>2</sup> Including those who had already visited Lisbon before, who responded positively in 89,4% of the cases.

Figure 5: Guiding (% of positive responses)

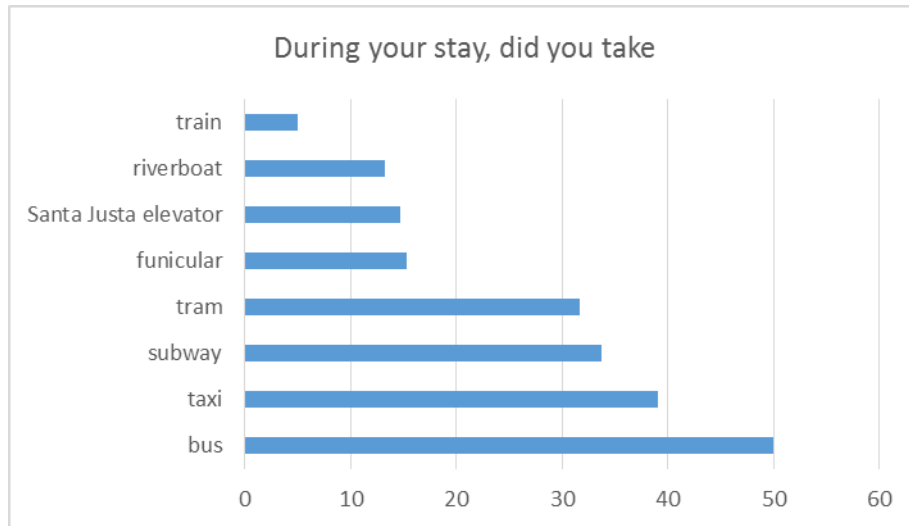


Source: authors, 2014

2.2.3. *Tourist mobility* - As far as urban mobility is concerned, it should be stressed that, unlike independent tourists, guided groups rely very much upon the overall organization of the trip, which normally supplies the local transportation as well. The space for independent choices is limited to the time at leisure, when group tourists have the opportunity to make use of public transport on their own, according to their needs, wishes and inclination to move inside a foreign and unknown – or poorly know – place, with all the consequent difficulties in terms of language, habits and culture.

Given the above, no wonder that the use of public transport by the respondents turned out to be not very intensive (Fig. 6). The highest score has been reached by the bus, which was used by 50% of the respondents. It's likely, however, that in many cases the respondents referred to tourist buses included in the travel package. 39% of them took a taxi, which is not very surprising, being the taxi one of the easiest ways for a foreign visitor to get around in the city, even if one of the most expensive. Subway was used by 33.7% of the respondents and tram by 31.7%, with the peculiarity, for this latter, of being at the same time a mean of transport and a tourist attraction, especially in the case of the famous *eléctrico* 28. The typical funiculars and the historical Santa Justa lift, in spite of their prevailing tourist value, were used by only 15% of the respondents. Scarce, or very scarce, was the use of riverboat (13.3%) and train (5%), while virtually absent were the rentals of cars, bikes, scooters, etc. The purchase of the daily ticket, which entitles visitors to use all means of transport, was limited to 26% of the respondents, which is congruent with the above-referred percentages for subway and tram.

Figure 6: Use of urban transportation (% of positive responses)



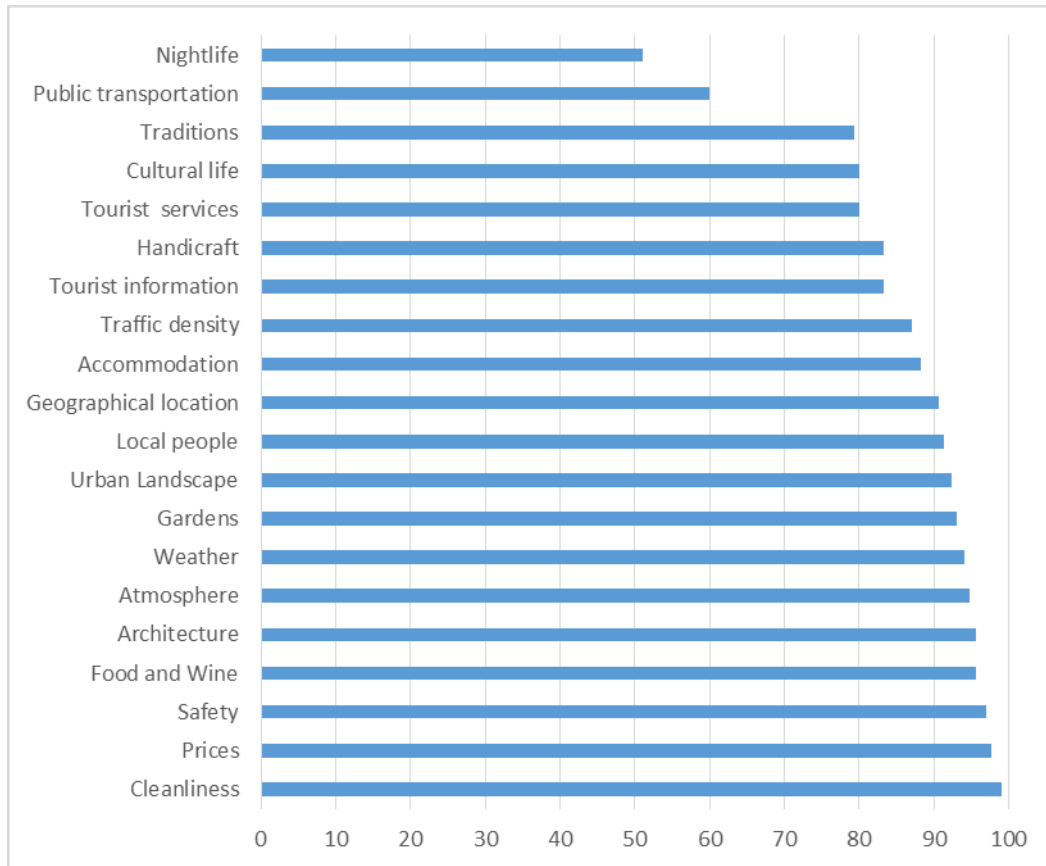
Source: authors, 2014

2.2.4. *Quality of tourism and quality of life* - This section of the questionnaire seeks to understand to what extent the tourist experience in Lisbon has gained the appreciation of tourists, not only regarding the aspects more or less explicitly aimed for tourism in the city (accommodation, tourism services, tourist information, handicrafts), but also with reference to the elements which define the quality of life in the city of Lisbon (traffic, cleanliness, safety, public transport, climate, etc.). These aspects of life are experienced daily by the residents of Lisbon and will certainly influence and even determine the perception of the tourist experience either in a positive or negative way (Sarra et al, 2015).

In general, all the aspects involved in the survey are quite well represented in the perceptual sphere of the sample (Fig. 7), which is demonstrated by the fact that almost all of them reach at least 80% of responses, with the obvious exception of the nightlife (51%), and the foreseeable exception of public transportation (60), given that less than half of the sample made use of it, as pointed out above.



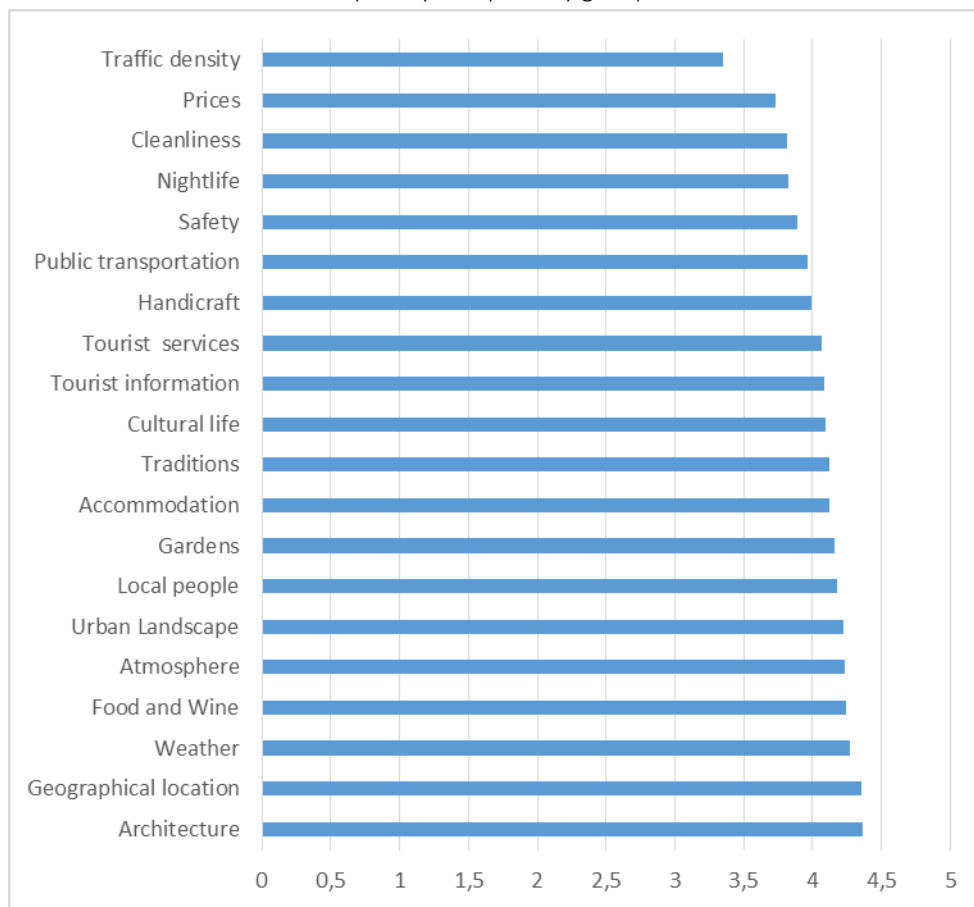
Figure 7: Quality of tourism and quality of life - number of responses (%)



Source: authors, 2014

Overall, the satisfaction of tourists is very high: no feature falls below a value of 3.3 (on a scale from 1 to 5) (Fig. 8). It's interesting to note that the aspects that reach the highest percentage of responses are among those who get the lowest score in terms of appreciation: cleanliness (99%; 3.81), prices (97.6%; 3.73), safety (97%; 3.89), while traffic density is placed at the very bottom of the list (3.35), according to the 87% of the sample. All the other aspects reach at least 3.8. The highest values (> 4.3) are related to architecture and geographical location, followed by urban landscape, atmosphere, food and wine and weather (between 4.2 and 4.3). Almost all of the aforementioned features have much to do with the authenticity, the everyday life, the city as it is as a result of its history, geography and culture. On the other hand, the aspects that are more closely related to tourism (accommodation, tourist information, tourist services) are positively perceived anyway, but at a lesser extent (around 4.1).

Figure 8: Quality of tourism and quality of life – average evaluation  
(1=very bad | 5=very good)



Source: authors, 2014

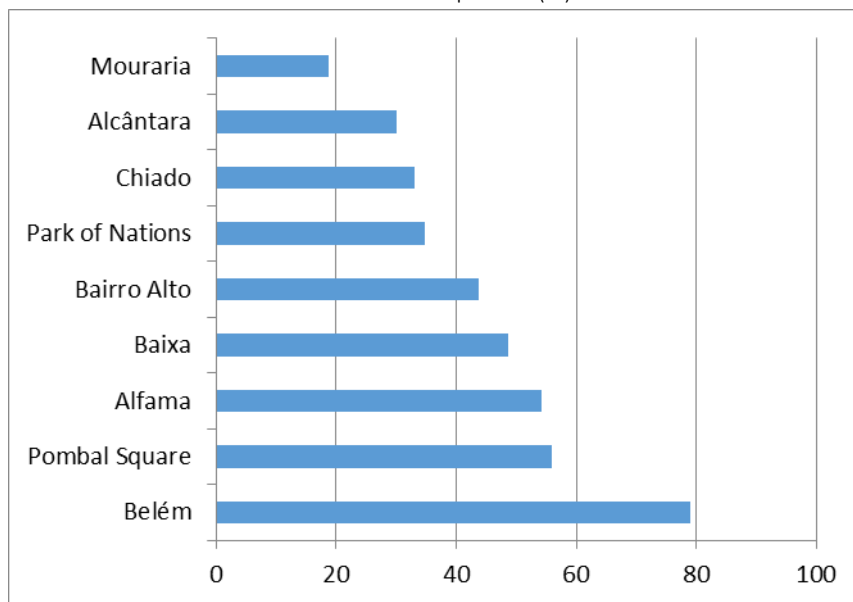
In conclusion, the authenticity of Lisbon and its quality of life have been very much appreciated by the sample, even if a few aspects (safety, traffic, cleanliness), although not perceived negatively, probably deserve more attention from the competent authorities. In the case of price level, the warm appreciation is probably explained by the fact that the reality of Lisbon does not match, if not for minor aspects, the idea – consolidated in the tourists imaginary – of a rather inexpensive destination.

2.2.5. *Tourist experience* – In this section, our aim is to evaluate the level of knowledge and appreciation of: a) different neighbourhoods of Lisbon, including those that are well established as tourist areas (such as Belém and Alfama), but also those that are emerging in the tourist market (such as Alcântara and Mouraria), thanks to the promotion of their tangible and intangible resources (e.g. the *fado* heritage in the Mouraria); (b) public services and infrastructures that are frequently used by tourists or that can be seen as urban landmarks of tourist interest, thanks to their visibility and aesthetic characteristics.

As far as tourist areas are concerned, the very first remark we can make is that the sample proves to have a quite low level of knowledge and awareness of Lisbon’s urban

geography: only the neighbourhood of Belém seems to be well known by the sample, with almost 80% of responses (Fig. 9). The area of Marques de Pombal Square and Alfama barely exceed 50%, while all the others fall below, with Alcântara and Mouraria at the bottom (30% and 18.7% respectively). In these latter cases, the reason is quite obvious: they are excluded, or rarely included, in the itineraries planned by the guides, because devoid of substantial tourist attractions, with the exceptions of nightlife and restaurants (Alcântara), or far from matching adequate tourist standards in terms of safety and cleanliness, despite their central location and a considerable cultural heritage (Mouraria). The relatively poor knowledge of areas like Baixa (48.7%), Bairro Alto (43.7%) and Chiado (33%) is harder to understand, considering that most likely the entire sample should have had the opportunity to visit them, or at least to transit through them. We can argue that, despite the high professionalism, the information provided by the guides only partially contributed to build an effective awareness of Lisbon’s urban structure: the fact of being guided has reduced the need – and therefore the interest – for an accurate knowledge of the city.

Figure 9: Tourist experience – neighbourhoods  
Number of responses (%)

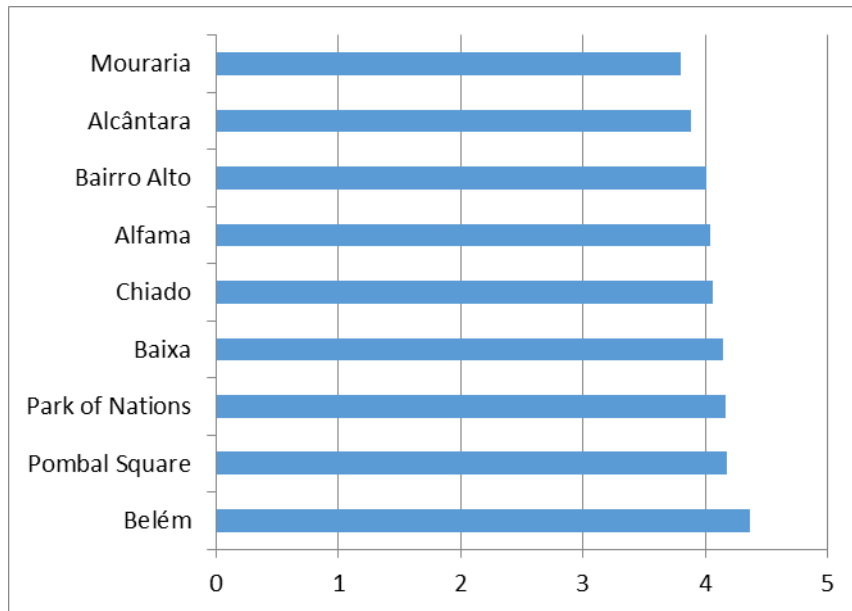


Source: authors, 2014

Notwithstanding this, the appreciation expressed by the respondents is very high (Fig. 10): almost all neighbourhoods achieved a score of at least 4, with Alcântara and Mouraria just below (for the aforementioned reasons, we believe). Predictably, the highest score is achieved by Belém (4.37), which seems to be the most emblematic area of the city, thanks to a combination of historical and modern architecture, scenic environment and gastronomy. We can also argue that its visibility (proved by the high

percentage of responses, as aforementioned) as a well-defined – and somehow separated – part of the city benefits from the peripheral location: Belém is a “destination” in itself.

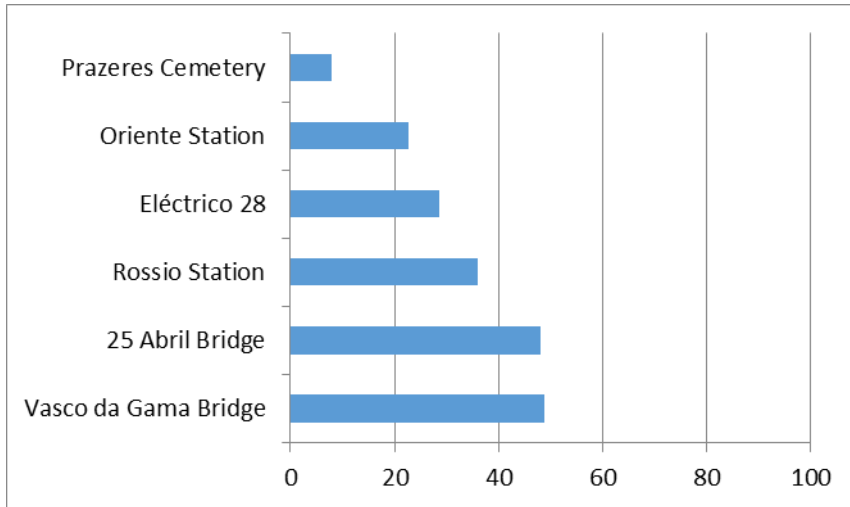
Figure 10: Tourist experience – neighbourhoods  
Average evaluation (1=very bad | 5=very good)



Source: authors, 2014

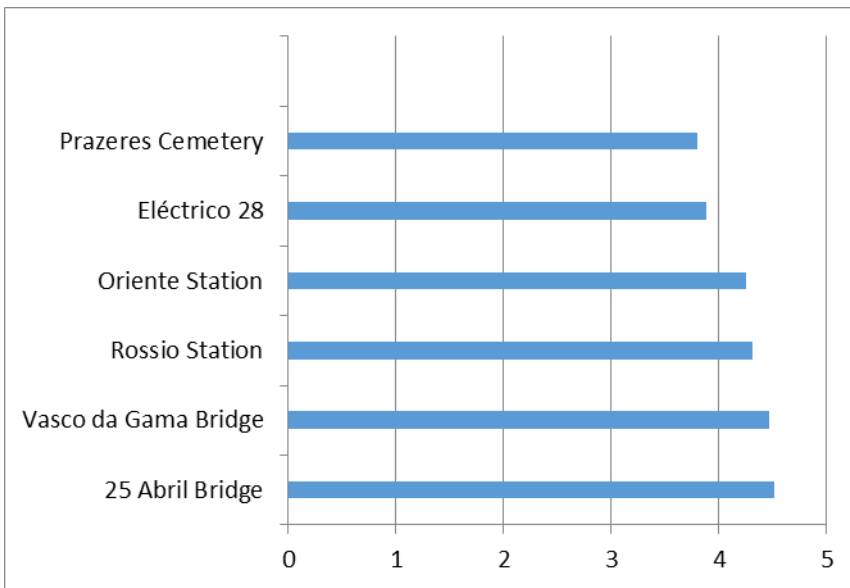
What has been written above about the poor knowledge of city’s neighbourhoods can be repeated for infrastructures and public services: none of them did even reach 50% of responses (Fig. 11). Only the bridges of Vasco da Gama and 25 Abril approach this level, with 48.7% and 48% respectively. Appreciation of the respondents, on the other hand, is generally very high, ranging from about 4.5 for both bridges to 3.9 for *Eléctrico 28* (Fig. 12). In the case of the latter, the low level of knowledge (28.7%), despite its undeniable iconographic value, is due to the fact that a trip on *Eléctrico 28* is impractical for big groups, whereas it’s more suited for independent tourists.

Figure 11: Tourist experience – infrastructures  
Number of responses (%)



Source: authors, 2014

Figure 12: Tourist experience – infrastructures  
Average evaluation (1=very bad | 5=very good)



Source: authors, 2014

*2.2.6 Quality of tourism and quality of life: some more remarks* - To better understand the level of the satisfaction of the interviewed tourists it is interesting to match some of the above results with the respondents' age groups and/or macro-areas of origin. In particular, examining the answers of the section 4 – quality of tourism and quality of life, we have found some important differences in the appreciation based on different ages and nationalities of tourists. Then we identified a common thread in some of the responses that allowed assembling together the answers in macro groups of aspects. Below the analysis of these macro groups:

## 1) Urban context and urban culture

Tables 3 and 4 show the age groups related with some aspects linked to the urban cultural sphere and landscape: urban context (urban landscape, architecture, gardens and geographical location) and urban culture (cultural life, nightlife, traditions and handicraft).

One preliminary consideration – valid in general for almost all the answers of the questionnaire – is that younger groups have, clearly, a greater willingness to answer to the questions; indeed the percentage of the responses is much higher in the first two age groups (<30 and 30<45).

Looking at table 3 can be easily observed that in all of the examined aspects younger tourists are much more enthusiastic than mature and senior ones, as their rating is above the average. More in detail, the tourists with less than 30 years gave scores with an average around 5: 4,75 for the urban landscape, 4,79 for the architecture, 4,58 for gardens and 4,75 for geographical location (while the general average is respectively: 4,22, 4,36, 4,16 and 4,35). For tourists aged between 30 and 45 years evaluations are lower but yet above the general rating. For the rest of the age groups the rating is under the average; also the evaluations are quite similar even if tourists  $\geq 60$  seem to appreciate the urban context of Lisbon more than the group aged 45<60.

Table 4 leads to similar remarks; youngsters and young adults pay more attention and appreciate more the urban culture of the city, including some aspects of its cultural heritage (traditions, handicrafts).

Respondents of the first two age groups are those giving scores above the average, while mature and senior tourists show smaller appreciation.<sup>3</sup> The only exception in this sense is the nightlife. In this last case tourists under 30 gave a score slightly below the average and even lower than senior tourists' average; indeed, although the obviousness, it is important to note that the quality of the nightlife has been evaluated by only the 40,27% of tourists  $\geq 60$  against the 91, 67% of the youngsters.

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<sup>3</sup> As noted in figure 10, the averages are 4,09 for cultural life, 3,82 for nightlife, 4,12 for traditions and 3,99 for handicraft.

Table 3: Urban context evaluation by age groups

AGE GROUPS	URBAN LANDSCAPE		ARCHITECTURE		GARDENS		GEOGRAPHICAL LOCATION	
	% number of responses	average evaluation	% number of responses	average evaluation	% number of responses	average evaluation	% number of responses	average evaluation
<30	100,00	4,75	100,00	4,79	100,00	4,58	100,00	4,75
30<45	100,00	4,34	100,00	4,54	100,00	4,17	100,00	4,43
45<60	90,00	4,08	90,00	4,40	91,95	4,07	92,50	4,24
≥60	90,60	4,15	96,64	4,27	93,05	4,09	87,92	4,30

Source: authors, 2014

Table 4: Urban culture evaluation by age groups

AGE GROUPS	CULTURAL LIFE		NIGHTLIFE		TRADITIONS		HANDICRAFT	
	% number of responses	average evaluation	% number of responses	average evaluation	% number of responses	average evaluation	% number of responses	average evaluation
<30	95,83	4,52	91,67	3,73	95,83	4,26	95,83	4,13
30<45	91,43	4,31	77,14	4,19	94,28	4,33	94,28	4,15
45<60	73,75	3,88	51,25	3,76	78,75	4,09	85,00	3,95
≥60	78,52	4,05	40,27	3,72	79,51	4,02	83,68	3,90

Source: authors, 2014

## 2) Quality of tourist facilities and hospitality

The other observed macro groups are more connected to the tourist sphere. To make significant the analysis we have split the responses by macro areas of origin (EU, Europe no EU, America, Others). Table 5 lists the evaluations for tourist information, tourist services and accommodation quality. In general EU citizens made a quite low evaluation and always under the average, while tourists coming from the American continent and from other countries seem to appreciate more the tourists facilities offered by Lisbon.<sup>4</sup>

In general the respondents are very enthusiastic of local people (average evaluation of 4,18) and of local gastronomy (average evaluation of 4,24) (table 6), but there are some smaller differences when we analyse the tourists' macro areas of origin. While the EU respondents gave scores slightly lower than the average, tourists coming from non EU Europe and from other countries appreciate more the Lisboners (average evaluations are respectively 4,38 and 4,44). Also food and wine is greatly preferred by the non EU

<sup>4</sup> The average scores for these aspects are respectively 4,08, 4,07 and 4,12.

Europeans with a very high score of 4,70, but in this case tourists from other counties gave the lowest score (4,10).

Table 5: Tourist facilities evaluation by macro areas of origin

macro areas of origin	TOURIST INFORMATION		TOURIST SERVICES		ACCOMODATION QUALITY	
	% number of responses	average evaluation	% number of responses	average evaluation	% number of responses	average evaluation
EU	81,82	3,98	77,54	4,03	85,03	4,09
Europe no EU	67,57	4,08	64,86	4,29	81,08	4,03
America	96,97	4,28	93,94	4,27	100,00	4,26
Others	80,00	4,38	60,00	4,00	100,00	4,80

Source: authors, 2014

Table 6: Hospitality evaluation by macro areas of origin

macro areas of origin	LOCAL PEOPLE		FOOD AND WINE	
	% number of responses	average evaluation	% number of responses	average evaluation
EU	88,77	4,13	95,72	4,17
Europe no EU	91,89	4,38	91,89	4,70
America	98,48	4,18	96,97	4,38
Others	90,00	4,44	100,00	4,10

Source: authors, 2014

### 3) Quality of urban life

The last macro group aims to investigate the tourists' perception of the quality of urban life. In this case analysis is made both by age groups (table 7) and by area of origin (table 8). In the table 7 it is interesting to observe aspects like prices, safety, cleanliness and public transportation obtained the highest evaluation by the under 30 and – except for the public transportation – the over 60, while the tourists aged between 30 to 60 years are more careful to express their appreciation as their scores are lower and frequently below the average.<sup>5</sup> Regarding the public transportation we can also add that the percentage of respondents decreases while the age is increasing. This means that, for obvious reasons, younger tourists used the public transportation more than the older ones.

Going to the macro areas of origin (table 8) it can be firstly underlined the strong appreciation of the local prices by the non EU Europeans; their average score of 4,22 is

<sup>5</sup> The averages are: Prices 3,73, Safety 3,89, Cleanliness 3,81, and Public transportation 3,96.



probably due at the presence in this macro area of people coming from Switzerland (about 60%) and from Russia (about 30%), countries with a very high purchasing power abroad. The same tourists seem to appreciate on the average the safety and the cleanliness of the city, aspects preferred by the respondents coming from America and from other countries. Concerning the EU citizens their evaluation for the quality of urban life is always under the averages, except for the public transportation scored 4,08.

Table 7: Quality of urban life by age groups

AGE GROUPS	PRICES		SAFETY		CLEANLINESS		PUBLIC TRANSPORTATION	
	% number of responses	average evaluation	% number of responses	average evaluation	% number of responses	average evaluation	% number of responses	average evaluation
<30	100,00	4,00	100,00	4,04	100,00	4,13	87,50	4,43
30<45	100,00	3,43	100,00	3,80	100,00	3,49	68,57	4,17
45<60	97,31	3,58	98,75	3,75	98,75	3,68	60,00	3,71
≥60	97,57	3,86	94,63	3,95	98,66	3,92	55,70	3,84

Source: authors, 2014

Table 8: Quality of urban life by macro areas of origin

macro areas of origin	PRICES		SAFETY		CLEANLINESS		PUBLIC TRANSPORTATION	
	% number of responses	average evaluation	% number of responses	average evaluation	% number of responses	average evaluation	% number of responses	average evaluation
EU	96,79	3,65	96,26	3,77	98,93	3,73	57,75	4,08
Europe no EU	97,30	4,22	97,30	3,97	100,00	3,78	54,05	3,85
America	100,00	3,65	98,48	4,14	100,00	4,03	63,64	4,21
Others	100,00	4,00	100,00	4,10	90,00	4,00	40,00	4,50

Source: authors, 2014

### 3. Conclusions

Lisbon's fast growth as one of the best tourism destination in Europe is a fact easily confirmed by the statistics presented in the first part of this work (markets, hotel occupancy, overnights and income). However, it is stated hereby, the capital of Portugal risks losing its authenticity because of mass tourism, if no rigorous planning is done before it is too late. It is true that a *Strategic Plan for Tourism in the Region of Lisbon 2015-2019* was settled, dividing the town and its outskirts into singular areas each one with a different type of product to be developed. But the question remains: Is Lisbon prepared to become a mass tourism destination? What will be the consequences?

It is our conviction that the present positive results are due to the effort that has been made in the past few years in the promotion of Lisbon as well as to the excellent

training and consequent good work of the professionals who are employed in the different sectors of the hospitality and tourism industry. In this particular issue, tour guides ensure a relevant role while promoting the word-of-mouth about Lisbon as a charming city of art and tradition and interpreting its identity, its landscape and its beauties to the visitors. In this paper we tried to understand the perception of Lisbon that in-group traveling tourists have, when there is the mediation of a tour guide.

Coming to the questionnaire, we can maintain that the results are in line with the scenario outlined above. The satisfaction of tourists – almost two-thirds coming from European Union countries – is generally high, both for what concerns the quality of the information supplied by the guides, and regarding the characteristics that define the quality of urban life and the quality of tourism. Almost 80% of the interviewed are middle-aged or senior, while almost all of them arrived in Lisbon by plane and stayed in good quality hotels (4 and 5 star).

As mentioned above, the level of satisfaction with the information provided by the guides has been undoubtedly high: in 7 cases out of 9 more than 70% of the respondents answered positively to the related questions. Such a good result is indicative of the high professionalism of the guides who administrated the questionnaire, but at the same time demonstrates the positive emotional involvement of the tourists and their desire to share the experience they have been living in Lisbon.

Unlike independent tourists, guided groups rely very much upon the overall organization of the tour, which normally supplies urban transportation service as well. Therefore, the use of public transport by the respondents turned out to be not very intensive, and limited to taxi, subway and tram for about a third of the sample (not considering the coach included in the package).

As far as urban features are concerned, it seems that the authenticity of Lisbon, its tangible and intangible heritage, its tourist facilities and services and its quality of life were very much appreciated by the sample, even if a few aspects (safety, traffic, cleanliness), although not negatively perceived, probably deserve more attention from the competent authorities.

Despite the high degree of appreciation of the city, the sample proves to have a quite low level of knowledge and awareness of Lisbon's urban geography: only the neighbourhood of Belém seems to be well known by the sample, with almost 80% of responses. The area of Marques de Pombal Square and Alfama barely exceed 50%, while all the others fall below, with Alcântara and Mouraria on the bottom. We can argue that, despite the high professionalism, the information provided by the guides only partially contributed to build an effective awareness of Lisbon's urban structure:

the fact of being guided has reduced the need – and therefore the interest - for an accurate knowledge of the city. Notwithstanding the appreciation expressed by the respondents is very high: almost all neighbourhoods achieved a score of at least 4, with Alcantara and Mouraria just below. Predictably, the highest score is achieved by Belém (4.37).

In conclusion, we can affirm that the sample of tourists involved in the survey is quite homogeneous in terms of age, habits, preferences, and taste. Unlike independent tourists, whose features can diverge dramatically, group tourists build up a more specific and definable market segment: they seem to have similar motivations, perceptions and attitudes even in presence of different cultures and income levels.

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**Butler's destination life cycle model applied to Estoril:  
Proposition of a walking tour  
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**Abstract**

Across Europe, Estoril's name resounds bearing a connotation similar to the glamour of Monaco, Cannes, and Biarritz. This paper's purpose is to suggest a walking tour recalling Butler's Destination Life Cycle's model blended with theory and practice on tour guiding in 6 steps. Indeed, Richard Butler's perspective on the *Exploration, Involvement, Development, Consolidation, Stagnation* and *Rejuvenation* stages shall be applied to the current example as the guided tour unfolds across Estoril.

This document also encompasses a summary on Estoril's history and recent statistic data on Tourism. Unlike other purely scientific papers, this one presents a method in which theory is empirically tested, coming to a close with some specific reflections. We hope this study will be perceived as an example of what the spirit of teaching theory alongside practice at a polytechnic institute means.

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**Keywords**

Estoril, walking tour, Butler's model, tour guiding.

**Introduction**

Across Europe, Estoril's name resounds bearing a refined connotation similar to the glamour of Monaco, Cannes, and Biarritz. With vestiges of a human settlement dating back to the Pre-historic period, the thermal springs were its 1<sup>st</sup> attraction. In the 19<sup>th</sup> century, the rise of Tourism across Europe and the fashion of sea baths led the court of Luís I to neighbouring Cascais from 1870 on, thus transforming the seat of municipality into Portugal's 1<sup>st</sup> domestic resort. In May 1914, Fausto Figueiredo signed the birth certificate of the resort built to pamper well-off international visitors, and now baptised as Estoril. Serious works were conducted to transform the coastal pinewood into a playground for the wealthy, and in 2014 it celebrated its 1<sup>st</sup> centennial, which is why we

may apply Butler's Destination *Life Cycle* model to explain its historic trajectory to visitors who wish to apprehend Estoril's personality through a walking tour.

Divided into 3 sections, this study starts by conducting a geographic, historic and tourist presentation of the resort. Then, we blend the theoretical framework with the accomplishment of the walking tour that follows Butler's stages. We finish with some reflections on both Estoril's attractions and its present condition within a post-Butler panorama.

This walking tour's methodological approach fuses theory and practice. To ensure the feasibility of the proposition, an actual walking tour was included in the social programme of the 4<sup>th</sup> *International Research Forum on Guided Tours* (IRFGT) held at the Estoril Higher Institute for Tourism and Hotel Studies (ESHTE) in March 2015. Therefore, national and international delegates/professionals enjoyed this suggestion on a 1<sup>st</sup> hand basis: we might even call it a *Fam Trip*. Although a tour guide resorting to props can conduct this visit, the performance organised included role-plays fulfilled with 5 students' aid. This empirical study lists all documental sources on several topics (from local history to heritage interpretation), besides recent tourist statistics. Unlike other purely scientific papers, this one presents a theoretical approach on tour guiding that is unveiled while the alternative tour occurs, considering Butler's 1980 model, and ending with a critical perspective on the last stage.

Figure 1 – Group meeting to prepare the final details.



Source: copyright by António Gonçalves

## 1. Estoril's brief presentation

Located c. 23Km away from Lisbon, Estoril witnessed the development of human settlement since the dawn of Mankind, as Pre-historic vestiges found reveal.

Map 1 – Portugal’s and Cascais municipality’s locations.



Source: <http://www.estoril-portugal.com/pt>

Map 2 – Cascais’ and neighbouring Estoril’s locations.



Source: <http://www.portugalvirtual.pt/lodging/costadelisboa/estoril/hotel.palacio/ptlocation.html>

In the late-1800s, physicians debated the influence of temperature and altitude in plights like tuberculosis, prescribing specific geographic areas for concrete malaises. In 1880, the princely *Casa de São José da Guia* was erected in Cascais, after an English physician’s advise to a Portuguese nobleman that it was the best solution for his wife’s health; by 1886, capitalist João Martins de Barros settled at a cove close to Estoril, so the air’s properties could assist his daughter’s lung affliction. It were also climatic reasons that led the newly-weds Fausto Figueiredo and Clotilde Ferreira do Amaral to

settle in Monte Estoril in 1910, facing the valley, after a Swiss physician's suggestion (Anjos, 2012).

A pharmacist and a businessman, shortly after moving in, Figueiredo acquired lands and designed the future resort with Henri Martinet's technical assistance. In May 1914, he presented the project *Estoril – Estação Marítima Climaterica, Thermal e Sportiva* to the government, whose designation gave away the four aces up the resort's sleeve. Thanks to the refined image promoted along with Portugal's neutrality during the 2<sup>nd</sup> World War, Lisbon and its fashionable Atlantic outskirts caught the attention of the Europeans that sought to reach the United States.

Europe's reconstruction after the war, the regained access to Mediterranean resorts, and the definitive firming of the suntan fashion, enforced a decadence period on Estoril that lasted from the mid-1950s to the mid-1980s. The shortcomings were gradually overcome after the country joined the European Economic Community in 1986, for the funds applied paved the way for social and material progress, mostly across Greater Lisbon. Therefore, it was only in the mid-1980s that Cascais' authorities had the investment required to recover its cosmopolitan image. As examples we might refer the *Formula 1 Grand Prix of Portugal* hosted since 1984, the foundation of ESHTTE in 1991, besides the Congress and Wellness centres inaugurated in the early-21<sup>st</sup> century.

More recently, one of the novelties of the 2008-2015 *National Strategic Plan for Tourism* was the extinction of the resort's promotional organism (*Junta de Turismo da Costa do Estoril*), for it was to be fused with regional counterparts. However, the local stakeholders would not go down without a fight. In July 2014 Cascais Tourism Association (*Associação de Turismo de Cascais, Visitors and Convention Bureau*) was created, aiming at promoting the new offer available in the fields of cultural, business, sport and health tourism (*Regulamento de Classificação dos Associados da Associação de Turismo de Cascais e da Quotização*, 2014).

Resorting to the September 2014 Estoril Coast Tourist Office report and its statistics, when comparing the years of 2012 and 2013, the 1<sup>st</sup> general impression is one of growth as far as sleepovers, number of guests, average stays, occupancy rates and foreigners' golf rounds are concerned. As Table 1 shows:



Table 1 – Statistic data concerning 2010, 2013 and the 1<sup>st</sup> semester of 2014.

	2010	2013	1st Semester 2014
<b>Overnights</b>	974.716	1.126.773	506.246
<b>Guests</b>	341.814	367.964	182.921
<b>Average Stay</b>	2,76	3,06	2,8
<b>Occupancy Rate</b>	53%	56%	52%
<b>Golf Rounds (foreigners)</b>	67.346	90.520	46.199

Source: Estoril Coast Tourist Office (2014)

In terms of overnights, there was an increase from 974.716 (2010) to 1.126.773 (2013), and the 1<sup>st</sup> semester of 2014 already registered a total of 506.246. As far as the average stays and the occupancy rates were concerned, c.3 days was the period to consider on the former, while the latter reveals figures slightly over 50%, which means there is plenty of room to grow in the years to come. This last remark leads us to speak of seasonality issues, since the data provided refers the lodging high season is linked to the period from May to October (summertime), while golf's high season is divided from February to May and then from September to November (around spring and autumn). As far as the income flows are concerned, let us look at Table 2. As we read:

Table 2 – Main markets lodged at the Estoril-Cascais units (2012-2013).

Rank	Country	2012	2013	Variation
1	Spain	152.623	115.499	-24%
2	UK	110.228	111.768	1%
3	France	73.566	90.126	23%
4	The Netherlands	84.590	74.497	-12%
5	Germany	75.744	70.917	-6%
	Scandinavia	101.592	114.269	12%
	Portugal	201.342	196.326	-2,49%

Source: Estoril Coast Tourist Office (2014)

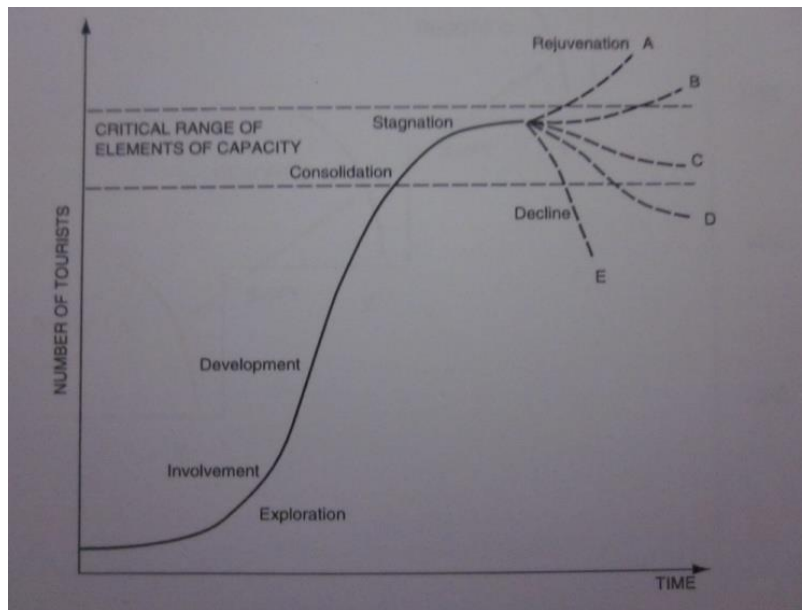
In general terms: (1) domestic tourists surpass all other nationalities (with nearly 200.000 people in 2013); (2) the top 5 foreign markets lodged at the local units happen to be European travellers; and (3) an interesting geographic *cluster* is linked to Scandinavia (indeed, many are the Nordic golfers who favour the Estoril-Cascais greens). In terms of rank and variation rate, the Iberian neighbour (Spain) comprises the highest flow, despite the 24% decrease of visitors between 2012 and 2013. The British are the 2<sup>nd</sup> group to consider with figures of weak variation (though increasing), while the French showed a remarkable 23% growth from 73.566 (2012) to 90.126 (2013), occupying the 3<sup>rd</sup> post. Dutch and Germans occupied 3<sup>rd</sup> and 4<sup>th</sup> places, respectively, in spite of the reduction of figures. In opposition, Scandinavian visits grew from 101.592 (2012) to 114.269 (2013), with a 12% variation.

## **2. Butler's model & theory on tour guiding applied**

In this section, we blend Butler's destination life cycle model with theory on tour guiding, applying both features on the accomplishment of a walking tour across Estoril's history and physical area that might be perceived as an alternative offer to promote the resort.

We should begin by recalling it is not easy to define *Tourism* since no theoretical approach has been yet universally accepted. Taking into account the several reflexions on the tourists' motivations, the activity's (social, cultural, physical and economic) impacts, the typologies of tourists and resources available at each destination, scholars started analysing this phenomenon over a century ago, with many models being presented according to a multitude of perspectives. In 1980, Butler (2004) presented his suggestion under the designation of *Destination Life Cycle* that we will apply across Estoril. This half-day visit can be accomplished by a tour guide resorting to props, but the proposition offered to the 2015 IRFGT delegates was accomplished with the assistance of students who are finalists of ESHTe's Tourism Information graduate degree. They will soon join the labour market, hopefully to inflate new ideas such as this one on the promotion of the country's delights.

Figure 2 – Butler's 1980 Destination *Life Cycle Model*



Source: Butler, 2014: p. 159

As Salazar (2010) refers:

Destinations worldwide might be adapting themselves to the standardizing trends of global tourism, but, at the same time, they have to commoditize their local distinctiveness in order to compete with other destinations (p. 49).

A similar position towards the positive effects of alternative/innovative tourism products before the ever-demanding 21<sup>st</sup>-century tourism consumer's behaviour is defended by Bramwell (2004), when stating that "‘Alternative’ products are often considered better adapted to the changing tastes of consumers, who, it is suggested, are increasingly looking for more specialist and customised holiday experiences" (p. 3). Meanwhile, Smith (2003/ 2007) stresses the need for such *destination re-invention* by actually pin pointing countries like Spain, Portugal and Italy and their urge to revive coastal resorts through several choices, "from upgrading the quality of the destination, (...), the targeting of new markets, or the diversification of the tourism product (...) [, to] cultural tourism" (p. 76).

Instead of dwelling on the latter, let us focus on the intercultural aspects that guided tours offer between the main player (the tour guide) and the audience (the clients/tourists). However, this shall never be a rigid *art form*, since all human elements act, interact and react (sometimes even overreact) along the duration of the *play* (the guided tour). As Brito (2010) defends, each tourist carries a set of behaviours and values that usually differ from those of the hosting country, and it is up to the guide's linguistic, cultural and intercultural expertise and sensitivity to ensure the success of the service

provided. Like Pond (as cited in Brito, 2013) sustained, tour guides are perceived by tourists as the personified reflection of a country or a region, as a sort of Public Relations professional, a teacher, and a diplomat who must be well-aware of the role he/she is playing/interpreting, for it shall endure after the visit as the foundation of the general perception the client shall retain on the consumed space/heritage. Dallen & Boyd (2003) sustain that interpretation “is essentially a process of communicating or explaining to visitors the significance of the place they are visiting” (195), while Tilden views it as “an educational activity which aims to reveal meaning and relationships through the use of original objects, by first-hand experience, and by illustrative media, rather than simply to communicate factual information” (as cited in Light, 1997, pp. 120-121).

Bearing those references in mind, this walking tour across Estoril starts at the Tamariz beach, with the tourists being greeted and filled in on the visit’s theme and on specific requests (according to the requirements the guide sees fit for the mental and physical comfort of the group), so that the visit smoothly begins. Thus, the group is fully prepared for the full scope of the *challenge* ahead, allowing each individual to manage his/her own expectations, anxieties, motivations, goals, and evaluation of the then-consumed experience. As Crang defends (2004), each tourist retains specific values and habits on walking that may vary between groups and timelines, “For some the adventurous and arduous is the aim, for others this implies a reduction in scenic appreciation, while for others the clothing and accoutrements offer avenues for pleasure and displaying social identities” (p. 79).

And in spite of tourists not wearing costume periods or special paraphernalia other than comfortable footwear, this tour across Estoril begins with the explanation of Butler’s 1<sup>st</sup> stage, that of *Exploration*. In this phase, the scholar defends the motivations for travelling are of a natural/climatic reason, with the destination lacking proper hosting conditions. In Estoril’s case, the guide refers the geographic/climatic features of the seaside whose tangible assets are the late-19<sup>th</sup> century *chalets* built by Mr. Barros and Mr. Schrötter. The speech is interrupted by a quirky young lady in late-19<sup>th</sup> century fashion: she is Miss Barros (like all the other characters, she displays a tag with Butler’s stage number and designation), and calls the group’s attention to the ocean’s scent and the seagulls’ songs that once nurtured her back to health. If the tourist experience may involve a sense of nostalgia and an escapist element, this dual emotional response may be gently provoked on the clients’ mental concentration with surprises like this interruption. When referring to character interpretation, Pastorelli (2003) states that costumes and other elements can be used to convey the theatrical side of an interpretation, which is “particularly popular with schools and holiday programmes at historic sites, botanic gardens and museums” (p. 266), besides alternative/innovative tours like the present one, we might add.

Figure 3 – Stage 1 at Tamariz Beach and the *unexpected* visit of Miss Barros.



Source: copyright by António Gonçalves

However, the guide may encounter and have to overcome communication obstacles. Taking into account some of the issues listed by Brito (2010) we refer as examples: (1) noise, since seagulls and the regular trains' arrivals can be nasty buggers, besides the fact that tourists themselves can get carried away by the beauty of the spot (regardless of nationality, for certain assumptions are overrated *clichés*); (2) should the visit happen on a windy, cloudy or rainy day the 1<sup>st</sup> stage should be cut short, in order to avoid an unpleasant experience; and (3) should it fall on a hot day, the heat exposure may also be a nuisance and curtail the beginning of the walking tour.

Thus said, the guide bids farewell to Miss Barros and the group is led across a tunnel that links the beach to the former valley, and which also allegorically represents the passage of Time from the late-1800s (and the Monarchy period), to the 2nd stage of Butler's Model, in the 1910s and 1920s (during Portugal's 1st Republic). Dubbed as Involvement, Butler links this stage to the growth of promotional initiative and human intervention across the physical landscape, thus ensuring the visitors' comfort, while a tourist season is gradually defined. This level takes the group to Saint Anthony's church, a timeless holy ground renovated thanks to the efforts of the well-off believers that already lived nearby.

Figure 4 – The 4<sup>th</sup> IRFGT delegates about to cross a time tunnel, following the guide.



Source: copyright by António Gonçalves

The guide then refers Figueiredo's plans for an international resort, besides the spiritual importance of the venue that was the centre of social meeting and spiritual comfort of the families involved in the development of Estoril. At the church's narthex tourists are also invited to touch and fully apprehend the contours of the Baroque glazed tiles through their fingertips. As Merleau-Ponty believes "the individual is engulfed by space" (as cited in Crouch, 2004, p. 87) and then resorts to the Senses as means to emotionally comprehend its dimensions. Therefore, "Things, artefacts, views, and surrounding spaces become signified through how the individual feels, and how he or she feels about them" (Crouch, *Idem*). And Touch is one of the most powerful means to reach such *connaissance*.

This 2nd stage counts on the assistance of a student keen on Portuguese Sign Language, proving this may become an inclusive tour for the hearing impaired. And if one day Estoril inaugurates a Tourism(s) & Tourist(s) Museum in the former telephone company building (a jewel of Modernism that still stands) as the author here suggests, hopefully even visitors with visual and mobility restraints will be entitled to fully enjoy the collection, and identity of the destination. In the meantime, the walking tour proceeds to the Park, where Fausto Figueiredo is portrayed at a (1971) bronze statue.

**Figure 5** – Stage 2 at Saint Anthony’s church and Portuguese Sign Language: Tourism as an inclusive activity.



Source: copyright by António Gonçalves

The 3<sup>rd</sup> stage, *Development*, is connected to a steady growth of tourist flows deriving from the successful promotion of attractions, events and venues available. In Estoril, the clients encounter the entrepreneur holding the blueprints for the resort. He then explains his vision, including the details of palm trees he longs to have aligned and the Casino that will crown the valley’s visual amphitheatre. Living in 1914, Figueiredo explains it all by using the Future Tense, while the 21<sup>st</sup>-century tourists behold already the heritage he ordered. He then proceeds with his planning, leaving the group behind, so the guide adds data on the 1930s’ sunny days at the beach and glamorous nights at the Casino.



Figure 6 – Stage 3: Estoril’s promotion conducted by Fausto Figueiredo, the resort’s *father*.



Source: copyright by António Gonçalves

Half-way through the visit, we hope each client’s cultural capital so far accumulated through role-play, factual data and sensorial perception may render the interpretation offered all traces of simplicity and effective entertainment that, as Light (1997) defends, this type of “informal education” (p. 126) allows. Hewison, too, believed that “an underlying motive for visiting heritage sites is escapism” (as cited in Light, 1997, p. 32), and we wish this time travel so far between the 1880s and the 1930s permits contemporary visitors to break free from their daily routines. The notions of cultural capital accumulated through informal education at a tourist resort thus (re)visited under the leadership of a certified tour guide, blended with the dealing of unexpected questions or the occasional joke facilitated by sporadic external elements, and well-managed by a seasoned guide, reinforces his/her role as a 1<sup>st</sup>-hand *PR* or diplomat to the country/region visited. As Pond (1993) indicates, “Inasmuch as travel offers a pure form of learning for all ages and backgrounds, guides play a prominent and powerful role into the process of life-long learning (...) [since] the guide’s role is multifaceted” (p. 87). What Pond defined as the “Art of interpretation” (pp. 141-142) derives from the mastering of linguistic and intercultural features, combined with the guide’s knowledge on each topic approached (besides a myriad of domains tourists may inquire about, we might add).

Stage 4, *Consolidation*, is then reached and Butler refers it as the period when Tourism becomes a key economic activity (at a local and national level). Inside the Exiles Museum, the group encounters Mrs. Goldenberg, a young Polish Jew who lost her



husband to the Gestapo, but managed to escape by car to Paris, by train to Marseille, and by steamer to Lisbon, and now awaits for the transatlantic connection that will lead her to America, as the movie *Casablanca* indicated and many refugees did.

Figure 7 – Stage 4: re-enacting Mrs. Goldenberg, a 2<sup>nd</sup> World War young Polish refugee.



Source: copyright by António Gonçalves

As Brito (2010) refers, props are a means to an end, diversifying the guide's interpretation and enriching the tourist experience. Therefore, not only we might take advantage of the temporary exhibition available (by picking a couple of items to contextualise the interpretation), as Mrs. Goldenberg's trench coat, terrible life tale and (nervous) laughter streaks may serve to convey the resort's dual atmosphere during the 1940s as a safe haven for jumpy central/eastern European outcasts. As Pastorelli (2003) defends, "the aim of storytelling is to tell their stories in such a manner that they evoke a sense of trance within their audience, and are not seen as telling the story but rather that the story is telling itself" (p. 260). Uzzel writes that interpretation may be informative and appealing, but once in a while it should be shocking, even cathartic (as cited in Brito, 2013), and we believe this grim episode may be perceived by all visitors. Some might argue that there are plenty of guidebooks if we need to be instructed on Estoril's History, but as Brown (2007) claims, "guidebooks need to be put in their place"

(p. 372), since they lack interpretation and the guide may act as the current voice of the ghosts' past.

The *Consolidation* stage lasted until the mid-1950s due to the Post-war exiles of leading figures like the Counts of Barcelona and the King of Italy. But then *Stagnation* (the 5<sup>th</sup> stage) ensued with the re-discovery of the Mediterranean Sea and the political and social turmoil Portugal was to face into the mid-1980s. Once again an allegorical Time transition is facilitated by a physical structure, this time a staircase that leads the group out of the Museum and into the street. To root that perception in the group's mind, the guide wears dark clothes and a gloomy face, asks for silence, and points at the wall close to the staircase, which is decorated with posters reading *Stage 5 – Stagnation*. As the word indicates, Butler characterises this period as one of decadence, when the destination faces social, political and environmental setbacks.

Figure 8 – The group focuses on the refugee's accounts, while the Guide prepares to wear only the dark colours of Stage 5.



Source: copyright by António Gonçalves

Again, with these unexpected details we hope to render a lasting memory to the visitor, once every step of the way different stimuli are being presented, and the *director* of the mental movie of disparate chronological periods enjoyed by the tourists has been the tour guide. Every guide's chameleonic trends lead him/her to find it quite rewarding the general appreciation towards these educated professionals as being adaptable, easy-

going, reliable and knowledgeable or as Wynn (2011) presents it, “Guides it seems, have existed in the public imagination somewhere between the labels of “trickster” and “teacher””. (p. 2)

Proceeding with the innuendo, back in the open-air the group returns to contemporary Estoril, while the guide takes the bleak garments off and presents the last assistant who speaks of the Stage 6: *Rejuvenation*. As if back on the spotlight, in this landing of the metaphorical staircase carved by Butler destinations are known for re-inventing themselves through new attractions and products, combining the sustainable recovery of environmental, urban and promotional faults into a serious bet on its future. In terms of the walking tour, references are provided on the 21<sup>st</sup>-century venues inaugurated (built on sustainable materials), besides the mid-2014 initiative led by Cascais’ stakeholders.

Figure 9 – After a few bleak decades of Stagnation, Stage 6 is blooming outside.



Source: copyright by António Gonçalves

The visit ends with the guide inviting tourists to join all characters portrayed in one of the hotels where a cocktail is poured, with Figueiredo and *guests* toasting to the Future: Cheers! As Ateljevic & Doorne (2004) state, the consumption of certain clothing pieces, healthy foods, gourmet wine and other practices taken as being of high status also include “appropriate” leisure and travel pursuits” (p. 294) perceived as distinguishers linked to a social group. In this case we do not refer to wine tourism, but rather to the

enjoyment of a once fashionable delight: the cocktail. Nevertheless, the regional fortified wine called Carcavelos is also a feasible option.

Figure 10 – *Cocktail* served at the Imperial Hall of the 5-star hotel.



Source: copyright by António Gonçalves

Figure 11 – Members of the Organising & Scientific committees toasting to quality Tourism led by *certified* Guides.

If Tourism is regarded as a healthy (yet, for some, still somewhat expensive) form of escapism, hopefully this tour takes visitors across different mental landscapes. As Terlenki (2004) defends, tourists are like modern pilgrims who seek “regeneration in the realms of pleasure, dream, tradition, arts, and sports, which prompt and preserve the ongoing quest for novel tourism landscape destinations” (p. 339). Such level of healthy evasion/day-dream can be accessed through the guide’s interpretation, and in mathematical terms when referring to these professionals’ performances, Education + Certification + Experience = Successful Travel Experience. Or as Brochu & Merriman (2002) defend,

It is the guide, the interpreter who makes something special happen. It is delivery with style and enthusiasm that works best: (...) therein lies the art of interpretation, applying the scientific principles on interpretation to help audiences make emotional and intellectual connections with meaning, inherent in the resources (p. 28).





Source: copyright by António Gonçalves

This walking tour is a feasible proposition and the rollercoaster ride across a timeline of c.150 years may be one of the means to revive Estoril's tourist image. As Puczko & Rátz (2007) state,

"Repackaging" existing attractions, arranging them into complex products, and presenting them in an unusual way can help reach new target groups. The "new look" may relate to the original theme of an attraction, but it may also present a new approach to create additional appeal (p. 137).

And who could be the best pioneering group to firstly experience (and enjoy) this blend of theory and practice than the multitude of professionals (guides, entrepreneurs and researchers) that attended the 4<sup>th</sup> *International Research Forum on Guided Tours*?

### Reflections

Divided into three sections, this paper presented an innovative proposition for 21<sup>st</sup>-century tourists to enjoy Estoril's history (1<sup>st</sup> section) and promotional image blending Butler's Destination Life Cycle's model to a theoretical approach on tour guiding (2<sup>nd</sup> section), here reaching the author's final remarks. In general terms: (1) the 1<sup>st</sup> stage (*Exploration*) corresponded to the period between the 1870s and 1900s; (2) the 2<sup>nd</sup>

stage (*Involvement*) fell on the decades linked to the 1<sup>st</sup> Republic, the 1910s and 1920s; (3) the 3<sup>rd</sup> stage (*Development*) landed in the 1930s; (4) the 4<sup>th</sup> stage (*Consolidation*) lasted from the 1940s up to the mid-1950s; (5) the 5<sup>th</sup> stage (*Stagnation*) was perceived from the mid-1950s until the mid-1980s, while (6) the 6<sup>th</sup> stage (*Rejuvenation*) is still going on.

The author cannot end this study without some remarks. Indeed, Butler's 6<sup>th</sup> stage may be segmented into three short-lived, yet significant trends: the 6.1 stage (*Product renovation*) was felt between the mid-1980s and 2005, while the path of uncertainty taken after 2006 is an unexpected 6.2 spin off version of the theoretical model, which she designates as *Destinations Cluster* (or dissolution through macro-management). The fusion of the tourism authorities of Greater Lisbon's municipalities under one leadership imposed by central government is proof of the lack of awareness of historical/cultural identities at a local basis. Since the 1930s, Estoril has been the driving force of promotion leading the neighbouring towns into the healthy competition that allowed them to evolve and promote their singularities. Would a macrocephalic organism be able to keep the golden goose under its surveillance?

The response was granted on the 25<sup>th</sup> July 2014, when Cascais' public and private stakeholders founded the *Cascais Tourism Association*. Therefore, 2014 marked the beginning of the 6.3. stage (*Municipal Foothold*). If history wasn't enough to recall Cascais' and Estoril's tourist importance to Portugal's image, international appreciation that included Cascais' municipality in the *100 Greenest Holiday Destinations* in the world (on a score of 8 points out of 10) reveals its environmental, social and cultural dynamics (Cascais está entre 100 Destinos Turísticos mais Sustentáveis do Mundo, 2014, p. 5). Within a diversified programme of events meant to celebrate its 650 years of administrative identity, Cascais did not forget its tourist promotion, and hopefully this walking tour prompted the IRFGT participants to assist on these intentions. Statistic data was also provided on recent years: seasonality and occupancy rates of c.50% reveal that with the proper promotional means and creative offer like this walking tour there is still room to grow for the years to come.

Figure 12 – Estoril’s *dream-team* who turned a theoretical model into an alternative tour full of surprises and emotions.



Source: copyright by António Gonçalves

The visit described was accomplished by a certified guide before national and international tourism professionals who travelled as delegates aiming at attending the 2015 IRFGT, hosted by ESHTe. We hope this empirical study may be perceived as an example of what the spirit of teaching theory alongside practice at a polytechnic higher institute means.

We suggested a cocktail at a local hotel to end the programme, but an upgraded version with raised costs could offer a hot-air balloon ride over Estoril’s Park, as a means to enjoy the outstanding bird’s eye-view ranging from Lisbon to Cascais, Sintra and Arrábida mountains. Another lavish suggestion might lead to packages that combine the guided tour with a relaxing massage at the local Wellness Centre. Adventurers or younger clients may prefer to combine the two-hour walking tour with a Geo-caching activity or even a Treasure Hunt. As Bramwell (2004) recalls, the Internet allows individuals to customise travelling “according to their specific needs and interests. ‘Alternative’ products have potential to be small scale and to involve modest tourist flows to specific plans, and thus they may encourage more flexible forms of production” (15).

In January 2014, Pereira’s article on a weekly magazine on the most appealing jobs for the decades to come listed *Space Tour Guides* and recalled Richard Branson’s *Virgin Galactic’s* goal to take the 1<sup>st</sup> group of cosmic day-trippers on a leisure flight to the moon in 2043. The interest in travel and the innate curiosity to unveil other human

societies' uniqueness lead us to Hatton's 2012 book *The Portuguese*, where the English author suggests Portugal's greatest attraction are the Portuguese themselves (ourselves), and that "Portugal's enduring appeal to foreigners shows little sign of waning. As the Spanish writer Miguel de Unamuno said after a visit about a hundred years ago: "the more I go there, the more I want to go back" (282).

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# Tour Guides and Tilden's Principles for the art of interpretation

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## **Abstract**

This paper aims at determining whether Tilden's six principles for the art of interpretation benefit the tour guides profession. With this purpose, a thorough literature review was carried out on heritage interpretation and tour guiding.

Results suggest that the art of interpretation adds value to the tourism industry. Furthermore, it produces benefits for the local communities and provides unique and memorable experiences to tourists.

A critical analysis based on the literature review and on the author's professional experience led to the conclusion that the Tilden's six principles are universal, have inspired scores of others, and represent a basic philosophy for the art of guiding tourists.

## **Keywords**

guides; tours; information; interpretation; tourism.

## **I. Introduction**

It is argued that the art of the heritage interpretation adds value to the tourism industry, produces benefits to local communities and provides unique and memorable experiences to tourists. This paper aims at finding out how Tilden's six principles for the art of heritage interpretation benefit the tour guides' profession. The methodology was carried out through a detailed review on the existing literature about heritage interpretation and tour guides professional activity. Afterwards, a critical analysis based on the literature review and on the author's professional experience. Findings suggest that Tilden's six principles are universal, have inspired scores of other authors and represent a crucial philosophy for the art of guiding tourists.

## II. Heritage interpretation

### II.1 – Conceptual frame

"I sometimes believe that interpretation... is more an art than a science" (Harry C. Parker, *cit in* Tilden, 2007, p. 56). Moreover, Uzzel (1989, *cit in* Brito, 2010, p. 419) argues that "interpretation has to be interesting, engaging, enjoyable, informative and entertaining. But from time to time has to be shocking, to trigger and cause a cathartic experience".

This chapter aims at defining the art of heritage interpretation, the language of the Earth, actually, the voice of the resources. This art is quite recent. Actually the terms interpretation and interpreter began to be used in the parks and resorts in Canada, and also in the American West during the years 20s of the 20<sup>th</sup> Century. These professionals were previously known as "Lecturers" due to the fact that many of them were professors and researchers at universities (Carr, 1993, *cit in* Knudson *et al.*, 2003). It was Enos Mills, the owner of a resort, who used the term "nature guiding", in 1920, to describe his own work in the Rockies. It was he coined the term interpret to describe his own work of nature guide. At that time, the alternative term for interpretation was education. However, it was Freeman Tilden, with the publication, in 1957, of his book "Interpreting our Heritage" who turned the term "interpretation" widely used and recognized. Therefore, it is assumed that the beginning of the history of the Heritage Interpretation in that year (Knudson, *et al.*, 2003).

The word interpretation has multiple uses and meanings. It can either be used in the translation between different languages or it can also refer to legal documents and explanation of certain dreams and omens. In this sense, Tilden (2007, p. 25) defines interpretation as "the translation from one language to another by a qualified linguist, the construction placed upon a legal document, even the mystical explanation of dreams and omens". Interpretation gradually came to replace the term "education". The word interpretation appeared to be a better term to describe the function of dealing with subjects that for most people were unfamiliar, such as geology, biology, botany, etc. It is almost like learning a new language, therefore, the process of translating this language, which may be considered the language of Earth, suggested the term interpretation (Pond, 1993).

To understand the concept of heritage interpretation, some definitions are presented in order to explain its meaning. Starting with a simple one: "interpretation is the voice of the resources" (Bureau of Land Management *cit in* Knudson *et al.*, 2003, p. 387). This simple definition serves as an introduction to help understand the meaning of interpretation. But the most cited definition of interpretation in the literature is Tilden's (Knudson, *et al.*, 2003) who defines it as "an educational activity which aims to reveal

meanings and relationships through the use of original objects, by firsthand experience and by illustrative media, rather than simply to communicate factual information" (Tilden, 2007, p. 163). Other authors define interpretation but always corroborating Tilden's principles for the art of interpretation. For example, Pastorelli (1962, p. 4) defines it as "a learning experience which seeks to enrich the meaningful relationships we hold with our world, and to foster and build a set of values which supports these relationships".

According to Brito (2013), interpretation is the most important element of the communicative component, which is a distinctive element to assess the quality of tour guides. Interpretation, the voice of resources through information (its raw material) educates and provokes visitors, allowing them to see beyond the physical reach of their own vision. It contributes to visitors' enjoyment, contributing to unique and memorable experiences. In this sense, Tilden (2007, p. 161) argues that "interpretation is an attempt to reveal the truths that lie behind the appearances and the interpreter's task is to plant the seeds of provocation and to help visitors to see beyond their mind's eyes". He further that "interpretation is not only education but also provocation", and that it would be easier to define this art by what it is not, making visitors to see beyond the physical reach of their own vision through provocation (p. 161). For Tilden, interpretation should not be confused with information, as the latter is in fact the raw material used for the interpretation.

From 1957 (Tilden's book publication) to 2007 (Ename Charter approval) some other authors and institutions involved in heritage conservation also contributed to the definition of interpretation (Gonçalves, 2012). For example, for Eduards (*cit. in* Knudson *et al.*, 2003, p.46) interpretation is a "powerful means for revealing that the land can react with kindness or with disastrous retaliations, depending on how it is treated. Knowing this, is to know wisdom and delight in living life, as a person, as a citizen, as a bit of Earth's life. People do not understand land automatically. They must be shown and they must have come to be shown because the story and its telling are more attractive than anything else they might of at the time". The definition proposed by the Professional Interpretation Australia Association (2001, *cit in* Gonçalves, 2012, p. 9) is "as a means of communicating ideas and feelings which help people understand more about themselves and their environment".

The Ename Charter (Icomos, 2007, p. 3) defines interpretation as "the full range of potential activities intended to heighten public awareness and enhance understanding of cultural heritage site. These can include print and electronic publications, public lectures, on-site and directly related off-site installations, educational programs, community activities, and ongoing re- search, training, and evaluation of the interpretation process itself". It substantiates Tilden's original concept. This definition

suggests that heritage interpretation is inclusive of all potential activities aiming at the increasing of the public awareness and improving the understanding of the meaning of heritage. Within this concept, one can include publications, conferences, facilities, educational programs, community activities, research, training and ongoing evaluation of the process of heritage interpretation.

The Ename Charter aims at defining the basic principles of interpretation and presentation as essential components of the heritage conservation efforts. Furthermore, it aims at improving public understanding and its recovery. It arose from the recognition that, as the Venice Charter had established the principle, according to which, the heritage protection was essential for its conservation, interpretation of the meaning of that Heritage should also be an integral part of the process of preservation and a critical factor for a successful outcome of the heritage conservation. This charter was approved, in 2007 (Icomos, 2007).

## II.2 - Objectives

Tilden (2007, p. 59) argues that "the chief aim of interpretation is not instruction but provocation". However, interpretation has other objectives such as helping people to gain a sense of the place, to respond to the beauty of the environment and to understand the meaning of people's own history and culture. Therefore, it aims at making visitors to recognize a given territory, more than just a mountain, a single river or a simple city. Also, it helps at developing the identity of its special features, actually the "big story", and what it represents in the overall scheme of things. Interpretation should expand into a broader horizon, for example, to teach how one can relate a battlefield with a whole war and its lasting effects on the politics and lives of its inhabitants. Furthermore, it has to make visitors leaving a museum or an interpretative center feeling what they could find there different or special, and, feeling a stimulus to find out more, and taking clues as how and where to exercise their own interpretation research (Knudson *et al.*, 2003).

Mills (1920, *cit. in* Knudson *et al.*, 2003, p. 385) claims "the interpreter can be a mighty factor in helping people to determine how they will best shopping spend their leisure hours. People are made and nations perpetuated through the right use of leisure time". As such, the purpose of interpretation is to help tourists to choose how to spend their leisure time, being this choice a key factor in perpetuating peoples and nations. Tilden (2007, pp. 59 – 68) contends "the art of Interpretation should stimulate visitors (listener or reader) to desire widening their horizon of interests and knowledge, gaining a greater understanding of the truths that are behind the statements of fact and enriching tourist visits".

Heritage interpretation aims at enriching visitors' recreational experiences, their perception of everyday life and those traditions surrounding them. It aims also at inspiring people to live more intelligently in social and natural environment, thus contributing to honor the past and secure the future. To this end, interpretation must be carried out by professional people, because it is a formal, noble and growing profession. Additionally, it aims at serving visitors in an innovative, effective and progressive manner, thus, at contributing to a better world (Knudson, *et al.*, 2003).

Heritage interpretation, a noble art, produces personal and socio-economic benefits by adding value to tourism and welfare to the host community. It is, increasingly, considered to be an integral component of many organizations, especially, in marketing business policy. Many leaders claim that interpretation will contribute, in the future, for a more dynamic society as its goals go far beyond than simple nice trips through the countryside or spending a quiet afternoon thinking of ancient artefacts. It promotes a less aggressive way of life to the planet and it helps to create stronger links with the cultural heritage and contributes to a more harmonious, mental and emotional relationship between the individual and the environment. Interpretative experiments should teach how to take better care of the planet and its cultural and natural heritage. Interpretation carried out with high quality in every nation, will be a guarantee for a better future, with citizens better informed and trained, respecting more their resources and culture and taking decisions taking into account the impacts on future generations (Knudson *et al.*, 2003).

### III. Tilden's six principles

Freeman Tilden was born on August 22, 1883, in Massachusetts, north of Boston in the United States of America. He was the son of a famous journalist, Samuel Tilden, who encouraged him to write. Actually, he did so during his youth, writing some articles for his father's newspaper, the Boston Transcript. Unlike his father's will, who wanted to see him to pursue an academic career, he preferred to travel and see the world, having become fluent in several foreign languages. At the age of 19 years old, he returned home and devoted himself to journalism. He began to write fiction books, short stories and poems. But at the age of 58 years old, when most people already think of retirement, Tilden decided to give a new direction to his own life, as he felt saturated of writing fiction. So, in 1941, he entered Newton Drury's office, the director of the National Park, and told him that he wanted to do something more useful to the world. Drury took the opportunity to have a talented man at his service and named him, immediately, his "administrative assistant" with "*carte blanche*" to formulate a plan for public relations and the National Parks System Interpretation. Since then, Tilden wrote many words, not only to entertain their readers, but also to inform and to educate (Craig, *cit in* Tilden, 2007).

Tilden's six principles for the art of interpretation (in 1957) were recognized and improved (in 2007) with the approval of the Ename Charter. This charter adds, essentially, the need for innovation and adaptation to technological changes, authenticity, sustainability, training, monitoring and the involvement of the host communities.

Tilden (2007, pp. 34 –35) first principle states that any interpretation that does not somehow relate what is being displayed or described to something within the personality or experience of the visitor will be sterile. Actually, visitors' interest must always come first. The second principle concerns information, which, as such, is not interpretation, which is revelation based upon information being entirely different things, but all interpretation includes information, its raw material. According to the third principle, interpretation is an art, which combines many arts, whether the materials presented are scientific, historical or architectural. Any art is in some degree teachable. However, telling the story is the "thing". Accordingly to the fourth principle, the chief aim of interpretation is not instruction, but provocation. And according to the fifth principle, interpretation should aim to present a whole rather than a part, and it must address itself to the whole man rather than any phase. Wisdom is not the knowledge of many things, but the perception of the unity underlying facts apparently unrelated; and finally, according to the sixth principle, interpretation addressed to children (say, up to the age of twelve years old) should not be a dilution of the presentation to adults, but it should follow a fundamentally different approach. To be at its best it will require a separate program as children absorb facts and cases, but they do not absorb abstract processes (Icomos, 2007).

As mentioned above, Tilden' first principle is focused on visitors' personality or experience. While the first principle of the Ename Charter is focused on the access and understanding by the public to cultural heritage. It is argued that interpretation, to be appropriate and sustainable, should stimulate interest and learning and encourage host communities and their members to reflect on their own perceptions of a site. Besides that, they should establish a meaningful connection with the site and should contribute with ideas and facts, which report the importance of cultural heritage conservation. In order to achieve this goal, it is crucial to identify, to target and to evaluate the audience, both demographically and culturally, in order to communicate the site values and significance to several different audience segments. Consequently, the diversity of language among visitors and communities associated with the heritage should be reflected in the interpretive infrastructure. The interpretation and presentation of these activities must be physically accessible to the public in all its variety and also in cases where the physical access is restricted due to conservation concerns, then the cultural or security issues sensitivities should be provided off-site (Icomos, 2007, p. 7).

Tilden's second principle is all about information, and the second principle of the Ename Charter defines the sources of information. It states that interpretation should be based on evidence obtained through scientific methods, academically accepted and show the range of oral and written information, relics, traditions and meanings attributed to a site and must clearly identify the sources of this information. It should be based on multidisciplinary studies of the site and its surroundings, properly, searched. One should also recognize that meaningful interpretation includes consideration of alternative historical hypotheses, local myths and other stories. The cultural interpretive programs, where the traditional narrative or historical memories of the participants are a source of information on the importance of the site, should incorporate these oral testimonies, or indirectly, through interpretive infrastructure facilities, either directly through active participation of community members associated with the site. Its visual reconstruction, whether by artists, architects or computer technicians, should be based on a detailed and systematic analysis of environmental, archaeological, architectural historical data, including the written examination, oral and iconographic sources and photographs. The sources of information, where such visual representations are based should be, clearly, documented and the alternative reconstructions should be based on the same evidence and, where available, must be provided for comparison. All research sources and information should be documented and archived for future reference and reflection (Icomos, 2007, p. 7).

Interpretation as an art which combines many arts is the subject of Tilden's third principle while the third principle of the Ename Charter sets the context and setting, stating interpretation of cultural heritage sites should relate to their social, cultural, historical, natural and their settings; and it should explore the historical, social, political, spiritual and artistic significance of a place, considering all aspects of cultural and environmental importance of the site. The contributions of all historical periods for the role of a site should be respected, as well as its contemporary context and its meaning. The process of interpretation must also take into account the cultural contributions of all communities associated with the site, including minority groups and the surrounding countryside, the natural environment and geographical location. The intangible heritage of a site, such as cultural and spiritual traditions, stories, music, dance, theater, literature, visual arts, personal customs and cuisine should be noted and included in its interpretation (Icomos, 2007, p. 8)

Tilden's fourth principle argues that interpretation is more provocation than education while the fourth principle of the Ename charter defines authenticity. According to it, interpretation must respect the basic principles of authenticity in the spirit of the document of Nara (Japan), in 1994. Authenticity is a concern to human communities and material remains. When designing a heritage interpretation program, should be



respected the traditional social functions of the site, cultural practices and dignity of local residents and associated communities. Interpretation should contribute to the conservation of the authenticity of cultural heritage by communicating its significance without misrepresenting their cultural values or change, irreversibly, your fabric. Also, the visible interpretive infrastructure such as kiosks, hiking trails, information panels, should be sensitive to the character, the setting and the cultural and natural significance of the place (Icomos, 2007, p. 9).

Interpretation should aim at presenting a whole rather than a part. Moreover, it must address itself to the whole man rather than any phase accordingly to Tilden's fifth principle. The fifth principle of the Ename Charter defines sustainability. According to this principle, an interpretation plan for a cultural heritage site must be sensitive to its natural and cultural environment, with social, financial and environmental sustainability among its central goals. Consequently, the development and implementation of interpretation programs should be an integral part of the overall planning, budget and cultural heritage management process. The potential effect of interpretive infrastructure, the number of visitors, the physical characteristics, integrity and the natural environment of the site must be fully considered in the evaluation studies of the impact on heritage. Interpretation should contribute to a wide range of educational and cultural objectives, for the success of an interpretation plan should not be judged only on the basis of numbers of visitors or revenue. In addition, the interpretation must also integrate the conservation process, increasing public awareness of specific conservation problems encountered at the site and explaining the efforts being made to protect their physical integrity. Any technical or technological elements selected to make permanent part of the interpretive infrastructure of a site must be designed and constructed to ensure effective and regular maintenance. Interpretive activities should aim to provide equitably and sustainably economic, social and cultural benefits to the host community through education, training and creation of economic opportunities. To this end, the employment and training of interpreters of the site from the local community should be encouraged (Icomos, 2007, p. 10).

Tilden's sixth principle concerns interpretation addressed to children (say, up to the age of twelve years old). According to this principle, it should not be a dilution of the presentation to adults, but should follow a fundamentally different approach. While the sixth principle of the Ename Charter defines inclusion, it is broader and it states that interpretation of cultural heritage sites must be the result of a significant collaboration between heritage professionals, the associated communities and other stakeholders. The multidisciplinary expertise of academic, restoration experts, government officials, site managers, tour operators and other professionals should be integrated in the formulation of interpretation and presentation programs. The traditional rights, responsibilities and interests of owners, residents and associated communities should

be noted and respected in the planning of the interpretation and presentation programs sites. These programs should be open to comments and public involvement. As the issue of intellectual property and traditional cultural rights are especially relevant to the interpretation process and its expression in various media (examples: on-site presentations, multimedia and printed materials), legal ownership and the right to use images, text and other interpretive materials should be discussed and clarified in the planning process of interpretation plans (Icomos, 2007, p. 11).

Finally, the Ename Charter comes up with a seventh principle defining the evaluation of research and training in the process of interpretation. According to this principle, continuing research, training and evaluation are essential components of the interpretation of cultural heritage to promote the understanding and appreciation of the importance of a site. Furthermore, it should be integral elements of each heritage interpretation plan because they should not be considered concluded with the conduct of a specific infrastructure interpretation. Any interpretive program and infrastructure should be designed and constructed in a way to ensure periodic review of the content and/or expansion. Interpretation programs and their physical impact on a site should be continuously monitored and evaluated. Periodic changes should be made based on scientific and academic analysis and public comment. Visitors and members of associated communities, as well as professionals working in heritage interpretation should be involved in this evaluation process. Each interpretation plan should be seen as an educational resource and its design should take into account its possible use in school curricula, communications and media, special activities, events and involvement of seasonal volunteers. Training qualified professionals in specialized areas of interpretation, such as content creation, management, technology, guidance and education should be a key objective of heritage interpretation. In addition, the basic conservation programs should include a component of interpretation in order to update and inform employees, host communities and members, recent developments and innovations in the field. International cooperation and the sharing of experience are essential for the development and maintenance of standards of methods and interpretation technologies. To this end, international conferences, workshops and industry professional's exchanges, as well as national and regional meetings should be encouraged as this would provide an opportunity for regular exchange of information about the diversity of interpretive approaches and experiences in various regions and cultures (Icomos, 2007, pp. 12 – 13).

### **Tour guides' performances**

As stated earlier, this paper aims at demonstrating, through a literature review, that Tilden's six principles for the art of heritage interpretation are a "milestone" for the professional activity of Tour Guiding. Tilden's book "Interpreting Our Heritage" is,

widely, regarded as the classic philosophical work on the subject of interpretation (Pond, 1993, p. 71).

A critical analysis based on the literature review and on the author's professional experience, led to the conclusion that Tilden's six principles are universal, have inspired scores of others and represent a crucial philosophy for the art of tour guiding. It is argued that these six principles contribute to enrich visitors' experiences, increases their loyalty through satisfaction, therefore, they are potential key factors for the sustainability of tourism destinations. Moreover, since the publication of Tilden's six principles, they have been distilled, refined, embellished, debated, embraced, and rejected but they continue still being the foundations on which the field of interpretation has been built (Pond, 1993).

Tilden maintains that personal interpretation has always been more powerful when done well. He cautioned against using gadgetry that cannot be maintained properly and he did grant that nonpersonal approaches are all right if an interpreter is unavailable, and that in certain circumstances nonpersonal media could be effective. He even suggests that a good result by device is better than a poor performance by an individual (Brochu & Merriman, 2002).

Despite the fact that guiding and interpreting being virtually synonymous, these two "camps" have not communicated until very recently. The gap between them has prevailed in part because of the tendency for public and private sector operations to proceed separately. Surprisingly, few tour guides within the travel and tourism field are familiar with interpretation and many of them approach the field, reluctantly. The trend toward increased dialogue and greater unity between the two camps will surely prevail in the 1990s. Therefore, "one notable distinction between guiding and interpretation which is particularly relevant to the discussion is that interpretation in the Park service, unlike guiding in the private sector, has long subscribed to the following principles: 1) to assist visitors in developing a keener awareness, appreciation and understanding of the area they are visiting; 2) to accomplish management goals by encouraging thoughtful use and reasonable behavior that minimizes impact on the resources; 3) and to promote public understanding of the agency goals and objectives in this case the National Park Service Manual" (Pond, 1993, p. 73).

Brito (2010), in his research, carried out some interviews to tour guides, and according to the results, interpretation relates to the transmission of emotions, which are focused on the tourist and include the application of rhetorical techniques. Besides that, through direct observation, it was confirmed the application of these techniques. There is a clear trend towards hyperbolisation of elements interpreted in order to impress the tourists, a good use of analogies and comparisons in order to provide references to

tourists, a good use of humor, but insufficient use of rhetorical questions, sayings and idioms and poor non-verbal expression. Veverka (2011) suggests that according to Tilden's six principles, the key element of interpretation is not what the message or program contains (the information) but rather how the information is presented. Knowing how to interpret the natural and built heritage is crucial to the tour guides' profession. It helps tour guides to arrange their presentations by looking to Tilden's principles. To interpret means to give a meaningful through a message (Brito, 2008).

Tour guiding activity, surely, ranks among the world's oldest professions. Humans have roamed the earth since they emerged and the earliest historical accounts refer to those who led the way, namely "pathfinders", "bear leaders", "proxemos", and "cicerones", actually all antecedents of today's Tour Guides (Pond, 1993, p. 1). These professionals are essential elements in the tourism experience and they play an important role in the tourists' learning process. In fact, they could and should make a better contribution towards heritage preservation, conveying responsible tourism messages and playing a more active role in sustainability. Unfortunately, they are not sufficiently trained to achieve this. As they are good communicators in foreign languages, they are more familiar with the tourists' own references, thus tourists would better understand their preservation messages. Within this process, tour guides should draw tourist attention to the importance of heritage while, simultaneously, explaining its relevance (Brito, 2012). Holloway (1981, *cit in* Pond, 1993) noted the paucity of studies on guides and tours, and he expressed hope that his study would act as a springboard for others. Although little published research on commercial guiding has appeared since Holloway's study, it would be an error to suggest that the professional guide has no philosophical or empirical foundation from which to draw. It is appropriate to recognize that a philosophy and even an extensive body of research and literature does exist, and it has for some time, within the field of interpretation. To the great extent that practitioners and researchers in the field of interpretation have tediously and carefully explored the sociological, educational, and cultural underpinnings of guiding, an overview of interpretation is useful here (Pond, 1993).

The name "guide interpreter" points out two basic roles for these professionals of tourism information: "to guide tourists in a geographic space, knowing the environment and facilitating the access of visitors to the visiting places; and to interpret correctly, in the language chosen by tourists, the information previously selected so that visitors know and understand the place visited and their most important cultural characteristics" (Brito, 2013, p. 52). These two basic roles are crucial to provide visitors a good quality experience. However, "tour guide's duties play other five roles, which are required in varying degrees depending on the nature of the group and situation, namely, to be the leader, the educator, the public relations representative, the host; and finally the conduit" (Pond, 1993, p. 76). In this sense, Mills (1920, *cit. in* Knudson *et*

*al.*, 2003, p.397) reasons that "this new occupation is likely to be far-reaching in its influences; it is inspirational and educational". Personal interpretation is just what it sounds like, one person interpreting to another person or persons. If some part of one's job involves talking directly to the public, one is working in the area of personal interpretation. Whether, it might be presenting formal programs at an amphitheater, or guiding on a trail, or presenting outreach programs to schools or civic meetings, tour guides could also be responding to guest needs at an information desk, answering questions on the phone, chatting with people on the museum floor, conducting demonstrations in an ecological exhibit at a zoo, or helping guest's spot wildlife from the deck of a cruise boat. Personal interpretation is one of the most powerful approaches to interpretation because the interpreter can be, continually, adapting to each audience. If someone is practicing personal interpretation, the opportunities to make emotional and intellectual connections are numerous, because one can learn about the guest and apply what she/he learns to enhance her or his experience. However, personal interpretative services are usually available for a limited amount of time each day and perform variably, depending upon the skill of the interpreter and how she or he feels at any given time. And personal interpretation is usually more expensive than nonpersonal approaches when one considers the cost per visitor contact. Non-personal interpretation includes brochures, exhibits, signs, audiovisual shows, and other things that do not require an actual person in attendance (Brochu & Merriman, 2002).

History shows that the process of tracing paths oriented to visitors add value to the territory and its resources. For example, in the current strategy applied to the Routes of Santiago de Compostela, a medieval route becoming of major global expression (Frey, 1998 *cit in* Figueira, 2013). The space is the main tourists' object of consumption. In the field of tourism, the economic, cultural, social, environmental, and the symbolic values are all critical elements in the routes planning. Tourism appropriates the space to develop from the point of arrival to the destination and its surroundings. Tourists are carriers of values and represent a stimuli in the territories they visit, which influences and where, of course, are influenced also. The territories are enriched by the presence of tourists but they can also impoverish themselves due to their intrusive effect. The key is the control and regulation in the search for a balance (Figueira, 2013). Historically, tourist routes depend on a number of variables that once coincident in action, result in a set where the raised activities at each point, on each node (circuit) on each line connecting circuits (itinerary), in each homogeneous set of itineraries (route), create wealth and forces, in turn, and operational need, the creation of processes so that local resources are transformed into tourism attractions, so they are perceived, sold, enjoyed and controlled (Figueira, 2013). Therefore, routes and its components are products and promotional vehicles of the territories. The most visited places show that reality and they can create geographical meshes between the "creative cities". Actually,

tourism destinations use the routing as a promotional tool for the consumption of available goods and services (Figueira, 2013).

The natural and cultural heritage, the diversities and the living cultures are the major tourism attractions but the excessively or poorly managed tourism and the tourism related development could threaten their physical nature, integrity and significant characteristics. The ecological setting, culture and lifestyles of host communities may also be degraded along with the visitor's experience of the place (ICOMOS, 2002).

Tilden's six principles for the art of heritage interpretation are universal, have inspired scores of other authors and represent a crucial philosophy for the art of guiding tourists. In sum, "through interpretation, understanding; through understanding, appreciation; through appreciation, protection" (National Park Service Administration Manual, *cit in* Pond, 1993, p. 65). As per this statement, it may be concluded that interpretation might be a key factor for the protection of cultural and natural heritage, therefore, for sustainable tourism destinations and more efficient tour guides' performances.

### Conclusion

This paper aimed at determining whether Tilden's six principles for the art of heritage interpretation can contribute for the performance of the tour guides' profession. The art of heritage interpretation adds value to tourism, produces benefits to host communities and provides unique and memorable experiences to visitors. It may be concluded that Tilden's six principles remain a key success factor for better performances of the tour guides. It works as a "bible" for this professional activity.

To meet the aim of this paper, a detailed review on the existing literature about heritage interpretation and tour guiding profession. A critical analysis based on the literature review and on the author's professional experience led to the conclusion that Tilden's six principles are universal, have inspired scores of others and represent a crucial philosophy for the art of guiding tourists.

It is recommended that this topic be subject of further research, as the art of heritage interpretation is a key success factor for visitors' satisfaction, therefore for the success of tourism destinations through visitors' loyalty.

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# Tourist guiding as a new course in higher education: The case of college of tourism in Belgrade

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## **Abstract**

In many countries tourist guiding is a regulated profession requiring a license, which is most often acquired through some form of education or training and examination or testing. Apart from specially organized courses where applicants get basic practical knowledge on tourist guiding, there are also examples of 2-4 year long education at special tourist guiding departments or study programs of the existing tourism colleges and universities (Turkey, Egypt, Latvia, Malta etc.). On the other hand, the topic of guiding as a distinct tourism activity is not sufficiently represented in the curricula designed and offered by vocational and academic institutions where future planners, managers, organizers and similar tourism professionals are educated. As a result, tourism stakeholders, such as government and quasi-governmental tourism organizations, destination management and marketing agencies, tour operators, travel agents, tourist attraction managements and the like, would not be able to display a deeper understanding of the roles of tourist guiding and the way of its operation and practical problems. This paper analyzes the case of the College of Tourism in Belgrade, which, for almost half a century, has been educating economists for tourism. The curriculum has recently been enriched by an elective course named "Tourist Guiding" which students can decide to follow in the third year of their studies. The experience with the first generation of students who attended the newly established course has proved that its inclusion in the curriculum is a welcoming and successful move which might be considered by other higher educational institutions for tourism.

## **Keywords**

tourism, tourist guiding, education and training, College of Tourism.



## Introduction

Guiding visitors in a geographically defined area dates back to the ancient times<sup>6</sup>. Although it is one of the oldest human activities, guiding has not become a ritualized and “institutionalized” profession yet (Holloway, 1981, p. 380). Moreover, one can claim that guiding is an occupation which, even today, means a part-time job, specific work conditions, irregular income, precarious living and unhealthy lifestyle. Because of the nature of their services, tourist guides do not possess offices or the actual business premises, so they do not fit in the hackneyed image of the “small enterprise”. With such an obscured visibility as well as a limited public reputation, Pond (1993, p. 13) claims, bearing in mind the “concealed” status of tourist guiding as a profession, that its members are “orphans of the industry”.

Nevertheless, domicile (“local”) tourist guides are one of the strategic factors behind a successful destination presentation with a profound impact on the experience and satisfaction of the visitors. They represent the key interface between the destination and its tourists, as pointed out by Ap and Wong (2001), further explicating that guides are the key players on the business frontline, in particular responsible for the incoming tourists’ satisfaction. Boyle and Arnott (2004) believe that the guide’s basic role is to broaden and strengthen the experience of the tourist by providing information in an interesting and culturally sensitive way. In fact, tourist guides are “an essential element in the tourism experience” (Brito, 2012, p. 448). In the prelude to the document “Tourism Services: Requirements for the provision of professional training and qualification programmes of tourist guides”, which was adopted as an EU standard in 2008, the following claim is underlined: “Tourist Guides are representatives of the cities, regions and countries for which they are qualified. It depends largely on them if visitors feel welcome, want to stay longer or decide to come back. They therefore contribute considerably to the perception of the destination. Tourist Guides are able to help travellers understand the culture of the region visited and the way of life of its inhabitants...”<sup>7</sup>

Although tourist guiding represents a responsible and demanding profession, it is even nowadays underrated and, basically, marginalised. Therefore, Dioko and Unakul (2005, p. 16) state that “tour guides represent a largely *underrated, undervalued and underutilized human resource* despite the widely acknowledged benefits and significant roles they assume in the tourism system” (italics by B.R.). Furthermore, Weiler & Ham (2001, p. 259) claim that “[t]he contribution and impacts of tour guides and tour guiding are usually glossed over by researchers, planners and managers”.

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<sup>6</sup> Ancient guides were referred to on several occasions by Herodotus in his History, why Hillman (2003) holds that the beginnings of this profession could be traced as early as 5<sup>th</sup> century BC (around 460 BC).

<sup>7</sup> Austrian Standards Institute, Vienna, 2008, p. 4.

The service quality provided by the guide, as an individual, depends on his training and competence, constant self-improvement of knowledge and skills, loyalty to ethical standards as well as personal qualities. However, the quality of tourist guiding cumulatively, at the level of the destination, considerably relies on the fact whether or not other parties of interest (such as local stakeholders – governmental or quasi-governmental tourism organisations, destination management and marketing agencies, tour operators, travel agencies, tourist attraction management and educational institutions), show the sufficient interest in and concern for the role, operating modes and problems of tourist guiding. The understanding of all significant aspects of this profession by all the parties that have either an explicit or implicit effect on it is a prerequisite for making suitable decisions in terms of legal regulations, education and training, service standards, performance evaluation, remuneration system etc. All the above mentioned play a major role in the quality and effects achieved by the domicile tourist guiding, that is, whether or not its potential will be successfully used in the development of inbound tourism.

### **Education and Tourism**

It is quite evident that the number of institutions and different curricula aimed at educating and training tourism professionals has exponentially increased over the last several decades. The majority of them combines tourism with business studies thus allowing “the subject to brand itself as a vocational discipline providing the business skills and knowledge required in the market and essential for any future aspiring ‘tourism manager’” (Fidgeon, 2010, p. 706). However, Cooper (2012, p. 207) claims that “[t]he poor linkage between educators/academic research and the tourism business sector is one of the reasons that tourism has failed to recognize the importance of knowledge...” and that, actually, “educators and researchers represent different *communities of practice* to the tourism sector itself” (p. 201, italics in original).

Tourism courses in higher education are often referred to as vocational (Busby, 2001), with “educators focusing on producing skilled and knowledgeable managerial personnel for the industry” (Inui et al., 2010, p. 26). It seems perfectly understandable when one has in mind the fact that mastering useful skills and practical experience gained in college may facilitate the job seeking process. On the other hand, Wheeler (2012, p. 211) holds that “...‘education’ has both a far broader remit, and deeper responsibility than merely vocational training... Higher education should encourage students to ‘think’ rather than train them to ‘do’.” According to Holloway (2006, 576), “the question of balance between job-specific skills and broader conceptual knowledge has long taxed employers and educationalists alike”.

Naturally, tourism does not solely involve business with certain skills being sufficient for the matter. Consequently, the education process in this field requires the balance between practical skills and “liberal aspects of tourism education” (Inui et al., 2010, p. 26), which develops students who are broadly educated and knowledgeable about, and responsible in tourism development as well as occupationally functional in tourism (Lewis, 2005). In the same manner, Tribe (2002, p. 351) proposes a curriculum resulting in “philosophic practitioners”, that is, curricula aimed “to deliver better service, but also contribute to the construction of a better tourism world”. It means that the concept of education should include the elements that contribute to gaining not only skills and competencies to work in the travel and tourism sector, but also to raising awareness of different non-business aspects and effects of tourism: “These would be graduates who deliver efficient and effective tourism services, attempt a comprehensive understanding of the tourism phenomenon while at the same discharging, the role of stewardship for the development of the wider tourism world in which these services are delivered” (Tribe, 2005, p. 58).

Tourism is a multisectoral and cross-sectional activity, and hence a multifaceted and multidisciplinary subject of study. However, most study programs are still primarily focused on economic and business (management/marketing) aspects of tourism introducing students to the operation of tourism suppliers and service production and delivery (destinations and attractions, the business of tour operators and travel agencies, hospitality industry, transport etc.). Rather less emphasis is placed on the specifics of tourists as customers and guests (motivations, expectations, behaviour, experiences) or local communities as hosts (ecological, cultural and aesthetic impacts), and their mutual non-business interactions (sociological and anthropological issues), while the area of culture mediation between the two sides is rarely represented (the content and quality of presentation of destinations and attractions, interpretation, intercultural mediation, and the like). It is rather unusual if one has in mind the fact that tourism is actually an activity with a high participation of different kinds of mediation. Moreover, tourism would not have become such a massive phenomenon if it was not for the role of mediators, either formal or informal ones (Jennings & Weiler, 2006), which in the stated role take part in all the stages of a tourist journey.

Almost all formal mediators in tourism function on commercial principles, but some exercise non-economic functions as well. Such is the case with guides who, as service providers, have also the role of “culture brokers” (McKean, 1976) or “cultural mediators and heritage interpreters” (Brito, 2012). As a primary and direct link between foreign tourists and a visited destination, they participate in the final delivery of the tourism product as well as in attesting the promotional image of a destination through

interpretation of its natural, cultural, social, and other values. Such a specific position has no other business sector of the tourism system.

It is therefore surprising that the subject matter of tourist guiding is not included in the curricula of tourism education, apart from the cases of dedicated training for future guides. In some countries special tourist guiding departments or tourist guide programs operate at the respective colleges and universities (Turkey<sup>8</sup>, Egypt,<sup>9</sup> Latvia<sup>10</sup>, Malta<sup>11</sup>), but primarily those who want to become guides study there. For instance, in Turkey, the education of guides is implemented not only in vocational schools, the duration period of two years, but also at certain universities, the duration period of four years (Avcikurt et al., 2009). However, other tourism students do not have the opportunity to become more familiar with these issues, probably because the services of tourist guides are usually treated as “ancillary services” in tourism (Foster, 1985, Holloway, 2006).

If one takes into account the area of former Yugoslavia, the pioneering attempt of including this subject-matter in the educational system can be seen in Croatia, introduced through the course of “The Methodology of Tourist Guiding” at the postgraduate level of tourism and communication studies in Zadar (in the academic year 2004/2005)<sup>12</sup>, as well as in Slovenia (The Faculty of Tourism Studies, *Turistica*, in Portorož), with “Tourist Guiding Management” still being one of the electives.<sup>13</sup> As regards Serbia, although there is a considerable number of academic and vocational educational institutions, faculties or vocational colleges at which students gain the necessary knowledge in different fields of tourism, tourist guiding as a distinct subject is taught only at the College of Tourism in Belgrade, since 2013.

### College of Tourism and its new course

There are two types of studies in Serbia. Academic studies aim at enabling students to develop and apply scientific, expert and art-related achievements. The character of such studies is primarily theoretical and they are taught at universities. Vocational (or applied) studies, which last 3 years, aim at enabling students to apply the knowledge and skills necessary for the involvement in the work process. Such studies are directed at practical problem-solving and they are taught at vocational colleges (schools).

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<sup>8</sup> In Turkey, there are several higher education institutions having a separate department for tourist guiding. The first department was a part of Nevsehir Tourism and Hotel Management College. <http://web.erciyes.edu.tr/english/colleges.html> [Accessed 10 June 2014].

<sup>9</sup> The faculty of Tourism in Alexandria (El-Sharkawy, 2007, 80).

<sup>10</sup> <http://www.va.lv/en/page/tourist-guide-travel-and-event-manager> [Accessed 10 June 2014].

<sup>11</sup> <http://www.its.edu.mt/courses-admission/full-time-courses/higher-national-diploma-level/hnd-for-tourist-guides.html> [Accessed 20 June 2014].

<sup>12</sup> This subject was afterwards renamed into “The Methodology of Interpretation of Cultural and Natural Heritage”. <http://www.isvu.hr/javno/hr/vu269/nasprog/2011/pred77787.shtml> [Accessed 14 May 2014].

<sup>13</sup> <http://www.turistica.si/downloads/Managementturisticnegavodenja.pdf> [Accessed 14 May 2014].

The College of Tourism, founded in 1967 as a state-owned institution, has the longest tradition in educating tourism professionals in Serbia (including former Yugoslavia up to the beginning of the 1990s). Apart from students who are subsidised by the government (the Republic of Serbia) – a total of 110 students are ranked based on their performance in the entrance exam and previous education, there are also students who pay tuition on their own. However, this status can be altered during studies depending on the performance and scores achieved in the previous academic year.

The College educates professionals to meet the demand of tourism companies for expert and managerial staff. The studies last three years, that is, six semesters. Graduate students get a degree of “Graduate Economist for Tourism” and are trained to carry out more elaborate and professional jobs in tourism-related companies and organisations: the job of package tour creators and organisers, sales representatives, work process organisers, tourism promotion organisers and the like.<sup>14</sup> As a result, the curriculum is profiled having the above mentioned points in mind, dominated by economics, management and marketing subjects.

It is essential to say that the introduction of “Tourist Guiding” as a subject (course) had a purpose of instilling (until now missing) knowledge and understanding of the theories and concepts as well as methodologies, techniques, procedures and practical implications of tourist guiding in contemporary tourism, not the purpose of substituting the existing process of obtaining a guide licence in Serbia, that is, be a training for the potential guides.<sup>15</sup> We chiefly had in mind the need for the future managers or other tourism professionals to get a more comprehensive insight into one profession which accomplishes a fairly significant, yet underrated, mission for a destination. Furthermore, when it comes to a vocational college, it is quite natural that its tourism curriculum does not neglect, let alone omit, the occupation which is unavoidable in the practice of modern tourism.<sup>16</sup>

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<sup>14</sup> <http://www.visokaturisticka.edu.rs/> [Accessed 10 May 2014].

<sup>15</sup> As in many other countries, tourist guiding in Serbia is regulated by law. The first professional guides in the former Yugoslavia appeared before WWII (in Dubrovnik). In the postwar Yugoslavia, this activity was regulated by separate laws in constituent federal units (republics). The first law on guides in Serbia was adopted in 1957 and since then has changed several times. The current Tourism Law (“Official Gazette of RS”, 36/2009) expanded the notion of “tourism professions” to the tourist guide, tour escort, tourist animator and local tourist guide. After a long time tour escorts have been regulated again and thus, in effect, the legislature acknowledged that tourist guide and tour manager are not the same vocation. Currently, according to a special bylaw any person applying for a tourist guide license has to meet several criteria (citizenship, secondary school education, foreign language fluency) and pass the “professional examination” (seven different subjects) in the form of tests, without any preparatory courses, consultations with lecturers or demonstration tours.

<sup>16</sup> One of the reasons may possibly be the intention of the College to legitimize itself as a reference institution for future programs of education, training and lifelong education of law regulated “tourism professions” in Serbia. The current program is expected to be changed in the near future and remodeled according to the previously mentioned European standard (EN 15565) on tourist guides’ qualifications.

It has also been assumed that the course can assist the interested students in identifying personal affinity and capacity for such a job and may help them to decide to take the state examination for a guide or escort (tour manager) license, organised by the authorised ministry. Namely, research by Rabotić (2010) has shown that tourist guides in Serbia mostly enter this profession without any previous knowledge about it. The determining factor of choice is advice taken from an acquaintance or a friend (who is, or used to be, a guide or, simply, works in the tourism sector), but also personal experience as a traveler within a package tour (another guide as a role model). Only after entering a profession and a period of engagement does an individual accept tourist guiding as his/her lifetime or part-time and temporary vocation. Thanks to the new course, potential guides among the students have the opportunity to be pre-acquainted with all aspects of the profession they are interested in.

Tourist guiding represents an extremely wide-ranging activity in terms of disciplinary contribution required to understand it. The subject matter does not fit into any particular traditional discipline and must be approached interdisciplinary, i.e. “between disciplines” such as business/management, sociology, psychology, anthropology, human geography or law as well as transdisciplinary, i.e. across a range of disciplines and on the basis of „integration of perspectives“ in a problem solving process (see Volgger & Pechlaner, 2015).<sup>17</sup> Only such approach, “freed from the intellectual shackles applied by disciplinary policing” (Coles at al., 2009, p. 87), can offer a comprehensive insight into multifaceted topic of guiding resulting in structured and integrated knowledge (i.e. a syntheses or “amalgam”), rather than only issues relating to nominated traditional disciplines. For example, the course deals with the following topics: motivation in taking guided tours and the character of the tour experience – activities, interests, meanings, attitudes (the field of psychology), the nature and dynamics of tour groups, patterns of group behavior and individual reactions of group members (social psychology), the guided tour as a form of tourism commodification, socio-cultural contacts and interactions on a guided tour, the influence of nationality on the tourist behaviour (sociology), processes of representation of local, regional and national identity through tourist guiding, mediation between different cultures and lifestyles and between the global and local, the concept of authenticity (anthropology), etc. It is important to note that the students have not previously had the opportunity to learn these issues in other courses, so that such varied content can additionally inspire them on wider critical reflection of tourism.

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<sup>17</sup> On the basis of the affiliations of the most prolific authors in the tourist guiding literature, Weiler & Black (2015, p. 7) noted: “[I]t is clear that human geography, environmental studies, business/marketing/management, sociology, anthropology, communication/language studies, psychology and environmental education figure prominently” in this field of research. On the other hand, “[t]he disciplines of economics, political science, law, medicine, history and most of the physical sciences do not appear to be influencing research on tour guides and tour guiding”.

The course is comprehensive in terms of linking theoretical and empirical research, as well as the practical experience, aimed at a more comprehensive interpretation of tourist guiding as a profession, an occupation, a segment of the destination's overall offer as well as a field of study. Therefore, the content includes a variety of ingredients that are conceptual, analytical, integrated, interdisciplinary, but practical and instructive as well. Unlike training courses designed for prospective guides with the stress on specific skills known as "the Art of Guiding" (Prince, 1997), such as navigation, positioning of the group, assessing group's abilities, timing commentary, storytelling, voice projection (audibility), non-verbal presentation and the like, such contents shed light on the elaborate nature of guiding. It is known that, as pointed out by Christie & Mason (2003, p. 9), "[c]ompetency-based guide training courses rarely ask the bigger, philosophical questions..." The approach which is much more than precise vocationalism should reach the objective of enabling students, regardless of the tourism sector they will be working in, to be prepared to properly perceive and assess the possibilities and achievements of tourist guiding.

Although, owing to its conceptual nature, the course is not strictly directed at the development of new skills (tour management, communication skills and "the Art of Guiding" in general), it unmistakably contributes to acquiring certain managerial, organisational and communication skills of the graduate students, at least to a degree which is provided by the newly-acquired knowledge in the field of relations between tourist guides, customers (tourists) and local communities. The purpose of such an approach is best indicated by Pearce (2005, 28): "It is possible and very defensible to have students who are aware of the many facets of tourism management and who have a set of technical and interpersonal skills readying them for further focused learning and employment".

Teachers who teach vocational subjects need, besides constant methodological and didactic training, further training in the field of their competences, in order to prepare students for the "real" working environment and be responsible to themselves and the people surrounding them. The implementation of this course demands a suitable profile of the teacher who should, beside the mastering of academic knowledge, have some industry experience – it would be beneficial if not essential if he or she is a kind of an "insider" in the guiding profession. With regard to the above mentioned claims, it was convenient for the College to have suitable human resources. As for the course lecturer, the College appointed the professor who has a PhD dissertation entitled "Tourist Guiding in Contemporary Tourism" (Rabotić, 2009), along with extensive experience as a professional guide. Besides, he has authored several articles on tourist guiding, as well as the textbook "Tourist Guiding – Theory and Practice" (Rabotić, 2011), which can be used by students as relevant reading material. The book is based on the research

published in the academic reference books, as well as on the manuals for practical training of guides, such as Prince (1997), or Pastorelli (2003). As a result, the introduction of such a course was implemented without any HR, organisational or logistic problems, which are quite common on such occasions, frequently defining and limiting the curricula contents at certain educational institutions.

The structure of the course consists of three main parts (*Table 1*). The course content allows students to become familiar with the following main issues:

- Concepts and definitions of tourist guiding and other similar activities in the field of tourism;
- Historical origins and evolution of the guiding profession;
- The position and roles of tourist guiding in the tourism system;
- Guided tours as a form of tourist guiding operations;
- The effects of tourist guiding on the content, quality and image of the destination product, as well as on the development of inbound tourism in general;
- Tourist guiding and the issues of responsible tourism;
- Legal aspects of tourist guiding;
- Criteria for evaluating service quality in tourist guiding;
- Possibilities and forms of monitoring the standards of tourist guiding;
- Theoretical and empirical research on tourist guiding.



Table 1. Structure and contents of “Tourist Guiding” course

<p><b>1. THE ROLE OF TOURIST GUIDING</b></p> <p><b>Tourism and Tourist Guiding</b>          Notion and definitions of tourist guiding          Distinctions in the categories of tourist guiding          Definitions of the <i>tourist guide</i> and <i>tour manager</i> in the EU          The use of the term <i>tour/tourist guide</i> in practice          Historical origins and development of guiding</p> <p><b>Theoretical concepts of the role of tourist guiding</b>          Holloway’s concept of the roles and sub roles in tourist guiding          Cohen’s model of dynamics and structure of the guide’s role          Review of other theoretical positions</p> <p><b>The mediating role of tourist guiding</b>          Mediation in accessing destinations and attractions          Mediation in delivering information and knowledge          Mediation in interpersonal contacts          Tourist guiding and cultural mediation          Global and local aspects of mediation          Intercultural competence          Interpretation as a form of mediation</p> <p><b>The role of tourist guiding in the development of sustainable tourism</b>          Tourist guiding and promotion of responsible tourism          Ecotourist guiding</p> <p><b>2. TOURIST GUIDING OPERATIONS</b></p> <p><b>Guided tours in contemporary tourism</b>          The concept and definition of guided tours          Advantages and disadvantages of guided tours          Guided tours and customer value          Guided tours and tourist experience          Typology of guided tours</p> <p><b>Tourist guiding methodological guidelines</b>          Specificity of guiding on walking tours          Specificity of guiding on bus tours          Specificity of guiding in the case of driver-guides</p>	<p><b>Communication in tourist guiding</b>          Communication competence          Important aspects of verbal communication          Important aspects of non-verbal communication          Commentary and narration in tourist guiding          Particular modes of delivering commentaries          Features of the interpretive commentary</p> <p><b>Managing the tour group dynamics</b>          Tourist group as a collection of individuals          General patterns of group behavior          Individual reactions to group membership          The impact of ethnicity on tourist behavior</p> <p><b>Tourist guiding as an occupation</b>          Basic features          Strategies of acquiring jobs          Emotional labour in tourist guiding</p> <p><b>3. THE QUALITY AND STANDARDS OF TOURIST GUIDING</b></p> <p><b>Quality of tourist guide services</b>          Personal traits as the quality factor          The impact of tourist guides on the quality of the tourism product          Tourist guiding and the destination value chain</p> <p><b>Tourist guiding and customer satisfaction</b>          Consumer expectations          The causes and forms of customer discontent          Customer satisfaction with tourist guides: Examples of empirical research published in academic literature</p> <p><b>Monitoring of tourist guiding standards</b>          Codes of Ethics          Professional associations          Individual awards and recognitions          Education and training          Certification and Licensing</p>
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## Implementation and evaluation of the course

The course was for the first time taught in academic year 2013/14, when the generation enrolled in 2011 based on the adjusted syllabus was in the third academic year, with “Tourist Guiding” being one of three electives (5 ECTS). Although the students’ considerable interest in the course could have been presumed, the fact that as much as 85% of students opted for this course had come as a major surprise (other students opted for one of the two remaining electives – either “Tourism Quality Management” or “E-Business in Tourism”). Since the number of students opting for one of the electives had not been limited, there was imbalance regarding the student–course distribution, which brought about some organisational challenges in the fulfilment of the course, especially of its practical segment.

According to the course syllabus and curriculum, the lectures lasted for one semester, two classes per week. The format was a mix of lectures, discussions, workshop exercises, directed study, and field work. Conventional exercise classes, which are part of other courses’ curricula, in the case of “Tourist Guiding” were substituted with two demonstration tours. Because of the huge number of students, each tour was realised in two groups at two different times.

The first tour was carried out in Belgrade in the form of an interpretive guided walk entitled “The Interpretation of Monument Heritage in the City Centre” lasting 90 minutes (*Figure 1*). The students were provided with an opportunity to listen to a specially selected guide (a historian by profession) in the form of interesting stories permeated by less significant details about the buildings and monuments of the most famous and oldest street, and anecdotes about people and events from the past.

The second tour, partially paid by students and partially subsidised by the College, was a full-day bus tour of the Northern Serbia, including a visit to an attractive town of Subotica and Lake Palic. During the journey time the course teacher was explaining the structure, contents and modes of guiding on a full-day tour, whereas when the group arrived at the destination it was conducted by a professional domicile guide.

As a result, the students were given an opportunity to compare two specific tours and two different guiding styles resulting in a class discussion on the matter.

Figure 1. Students on a guided walk (Old Town of Belgrade, November 2013)



Source: <http://www.visokaturisticka.edu.rs/>

After the semester was over, the first examination term was January 2014, followed by April, June, September and October. In all of the mentioned terms, examination results were good (*Table 2*), which, as one of the indicators of successful teaching process, point to some interesting conclusions.

As *Table 2* indicates, the majority of students (166) applied for the exam in the first term, January 2014, but the examination entrance was 63.25%. Along with average examination entrance for all the terms (50.69%) it, among other things, shows that the course “Tourist Guiding”, despite being one of the electives, students in no way regard as “easy to pass” (either because of the subject-matter or the criteria of the teacher). Consequently, students choose to take an exam only when they are sufficiently prepared for it. One can draw such a conclusion based on the overall examination results which are relatively high (in total, 77.17%), as well as based on high grade point average (8.28). Naturally, state budget students generally also achieve better results in their other exams, passing them as early as in the first term.

Table 2. Statistical data for the “Tourist Guiding” course (Examinations 2014)

Examination periods (Terms)	Exam Applications		Examination Entrance		Examination Results		GPA**	
	B*	S*	B	S	B	S	B	S
January	<b>166</b>		<b>63.25%</b>		<b>74.29%</b>		<b>8,59</b>	
	120	46	66.67%	54.35%	77.50%	64.00%	8,79	7,81
April	<b>83</b>		<b>48.19%</b>		<b>90.00%</b>		<b>8,22</b>	
	54	29	55.56%	34.48%	90.00%	90.00%	8,41	7,67
June	<b>46</b>		<b>43.48%</b>		<b>65.00%</b>		<b>7,77</b>	
	26	20	50.00%	35.00%	61.54%	71.43%	8,25	7,00
September	<b>37</b>		<b>27.03%</b>		<b>60%</b>		<b>7,50</b>	
	20	17	25.00%	29.41%	60.00%	60.00%	8,00	7,00
October	<b>31</b>		<b>29.03%</b>		<b>100%</b>		<b>7,11</b>	
	16	15	37.50%	20.00%	100%	100%	7,33	6,67
TOTAL	<b>363</b>		<b>50.69%</b>		<b>77.17%</b>		<b>8,28</b>	
	236	127	58.78%	39.37%	79.10%	72.00%	8,55	7,50

\* B = state budget students; S = self-financing students

\*\* Grade Point Average: Students have passed the exam with a grade of 6 (lowest) to 10 (highest)

Source: Internal documentation of the College of Tourism

The fact that students have shown a considerable interest in the new course (corroborated by the number of students who opted for it) is encouraging. In addition, they consider the course useful for their future career in the tourism sector. Therefore, they choose to take an exam only when they master the course material, so their good examination results seem to be more than a logical outcome. Since we are talking about senior students, several of them selected the guiding topic for their graduation thesis.

It would be interesting to find out the number of students (if any) who will, owing to the successfully mastered course, show an interest in the profession of a guide, or, on the other hand, give up on the original idea of obtaining a tourist guiding state certificate.

Finally, there is a question of the course’s long-term effects still to be tackled and answered in the future. Namely, one should pay close attention to the attitude that the students of College of Tourism will have towards the guiding profession once they become tourism professionals in different places and positions. Will these future stakeholders in the tourism sector of Serbia (and the prospective employers of guides) show more understanding, than it is the case today, for the role, importance, potential and problems of tourist guiding?

## Conclusion

Tourist guiding as an activity, occupation and type of work is a theme which can be learned about in specially organized training courses whose attendance is often a prerequisite for obtaining a guide license. Such courses are primarily focused on

technical, i.e. practical aspects of guiding and their main goal is to supply applicants with the skills required for the job. On the other hand, in higher education, this subject matter is not represented or it is only lightly mentioned, most often in the course titled "Tourism Management". Thus, students of tourism, whether in vocational or academic studies, do not have the possibility to gain a broader insight into the activity which doubtlessly play an important, though often glossed, role in contemporary tourism. Keeping in mind that students of tourism as future managers, planners, organizers and other professionals or stakeholders in the industry should obtain a comprehensive picture of the role, the way of operation and the importance of guiding for the quality of the tourism product and its delivery, College of Tourism in Belgrade has enriched its curriculum with a new course titled "Tourist Guiding". Its conception and content vary from the issues taught in specialized courses for guides, because they include ingredients that are not only practical and instructive, but conceptual, analytical and interdisciplinary as well. In other words, students learn not only about methodology, techniques and procedures of guiding, they are also informed on theoretical and empirical research from multiple disciplines, which gives them a deeper and well-rounded knowledge. The experience with the first generation of students who attended the newly established course has proved that they are very interested in the subject matter of guiding because they consider it important for their future work in tourism. Its inclusion in the curriculum of the College of Tourism in the form of a separate course has apparently been a welcoming move which could be followed by other similar educational institutions.

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**Cultural events and tourist services:  
A management model for guided tours**

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**Abstract**

The introduction of ICT in the tourism sector has had a significant impact on competitiveness that goes way beyond the traditional approach of mere conservation of cultural heritage. Innovative methods in the cultural sector can be useful for tackling the organizational problems and critical issues that affect operators in the various phases of a guided tour.

This study analyses the opportunities for the tourism sector and Intangible Cultural Heritage arising from approaches such as Business Process Management (BPM) and Product Lifecycle Management (PLM). These models, already in place in many areas of the industrial sector, could easily be extended to the tourism and cultural sectors. The purpose is to extrapolate a meta-model able to manage the organizational variables and critical issues emerging in the evolution of cultural routes. The model will provide

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18 A. Trono is the author of paragraphs 1 and 4; A. Corallo of paragraphs 3 and 3.1; D. Vestito of 2 and 4.1; M. Esposito of 3.1 and 5. The introduction and conclusions are the work of all the authors.



guidelines to the backend unit that organizes guided tours and various kinds of event. This aspect is key to the success of replicable events because it provides a Management Information System that supports future planning with historical data.

The management model investigated was applied to a specific case study: “The Ways to Jerusalem: Maritime, Cultural and Pilgrimage Routes, an itinerary of cultural and spiritual interest”.

### Keywords

Tourism, Cultural Routes, Management, Information System

### Introduction

Now seen as a form of sustainable tourism and increasingly promoted by means of Information and Communication Technology with pervasive effects on the creation, production and consumption of the regional tourist product (Stamboulis & Skayannis, 2003), tourist itineraries are becoming increasingly successful. Associated with interest in the landscape and culture (gastronomy, handicraft, folklore, religion, etc.) and undertaken on foot, by bicycle or on horseback, they provide an opportunity to discover, touch and experience the life, history, nature, culture and values of different peoples. They have drawn the attention of researchers (among others, see Baldacci, 2006; Majdoub, 2010; Zabbini, 2011; Mariotti, Dallari, 2011; Berti, 2012; Beltramo, 2013; Cerutti, Dioli, 2013; Trono, Oliva, 2013; Trono, 2014) and experts in the sector, as well as public and private bodies on the local, national and international level (see the programmes of community interest, CoE, etc.).

After a brief analysis of the features of cultural itineraries, this study analyses the opportunities to promote them for tourism purposes arising from the use of the logic and principles of *Business Process Management* (BPM) and *Product Lifecycle Management* (PLM). Specifically, innovative promotional techniques were applied to the cultural itinerary entitled “The Ways to Jerusalem”, which is currently seeking recognition from the Council of Europe. In 1987 the CoE launched the *Cultural Itineraries* programme ([www.coe.int/routes](http://www.coe.int/routes)), declaring them to be an important tool for promoting tourism and local development. A theoretical management model, based on the BPM and PLM approaches, was applied to the route and was seen to help in overcoming the problems observed in the itinerary’s conception and activation phases. Starting from a hypothesis regarding the application of the model to Event Management in support of the planning and management of the itinerary, the paper will focus on the variables that can be optimised by the use of innovative technologies in the management of the backend processes of a guided tour.

## 1. Cultural routes, a new model for tourism destinations and a tool for economic development

Increasingly aware of the importance of their free time and increasingly selective in their choice of holiday, today's tourists are rejecting standardised models and choosing destinations that offer attractive, experiential and educative situations (see Poon, 1989; Gilbert, 1989, p. 42; Pigram, 1993; Brown, 2013; Tinacci Mossello, 2014). They prefer special events (including festivals), particularly thematic routes/itineraries, which combine the "cultural landscape" (resources) with the "living landscape" (heritage). The reasons for this choice are economic, i.e. driven by a search for lower costs, but also psychological, dictated by the rejection of the role of mass tourist, consumer of inclusive tours with densely packed schedules full of destinations to be visited in a hurry. Such tours are driven above all by the objectives of the "three/four Ss" (*sun, sand, sea/sex*), in opposition to which we may posit the "three Es" (*excitement, education, entertainment*) as the motives for a journey that enables the discovery of nature, cultural heritage and the "other", but also of one's self, in a sort of "reconstruction and regeneration" of body and soul (Krippendorf, 2013, p. 54).

The cultural itinerary, a "complex and inclusive" asset (Berti, 2013, p.1), satisfies these expectations, enabling the "tourist" to obtain cultural benefits and to rediscover the values of *a slow pace* and *spirituality*. The host community also participates in this process, becoming more aware and informed by a better-educated class of tourists and benefiting not only in an economic sense, but also in social and ethical terms, thanks to the route's social content and its association with the community's identity and cultural heritage (Balestracci, 2008).

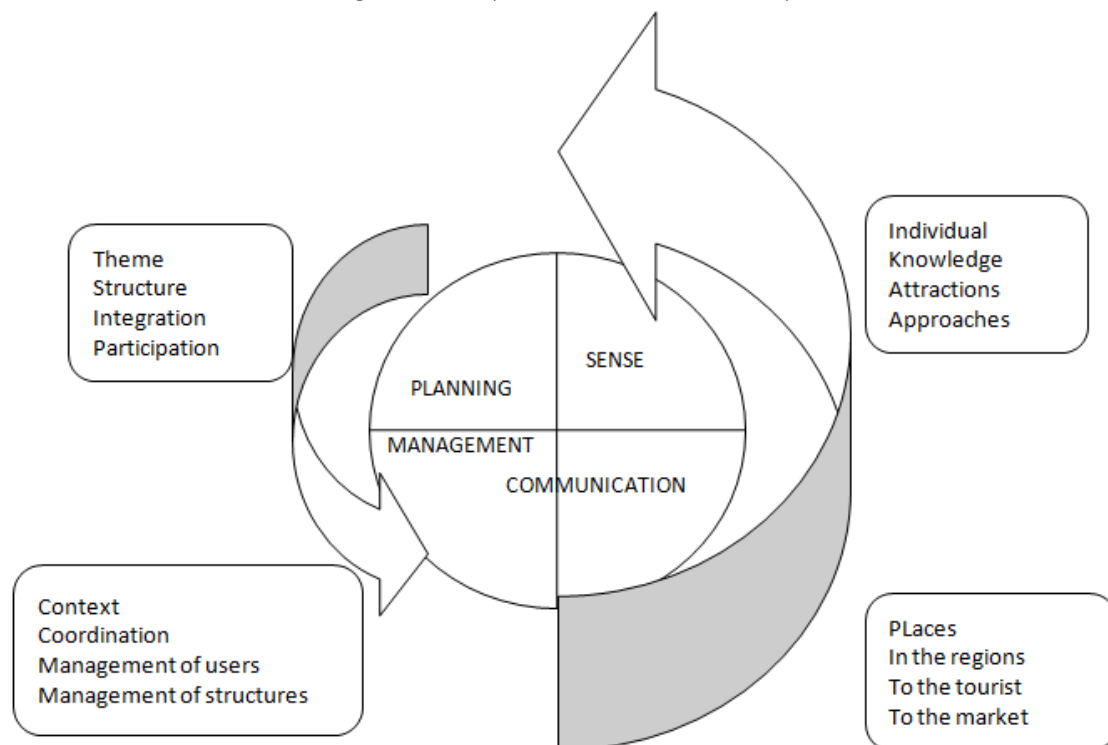
The cultural itinerary may thus be seen as a form of *aware tourism*, generating a «virtuous circle of *awareness, satisfaction and well-being* on both the supply and demand sides [...], which is a necessary and sufficient condition for the creation of positive feed-back between supply and demand. This in turn is a condition and a sign of a regional (tourism) system that is resilient and self-reinforcing: sustainable, i.e. able to last and evolve positively over time» (Tinacci Mossello, 2014, pp. 278-279). At the same time, it respects the intrinsic value of each individual element of which the itinerary is composed.

Positioning itself as a new concept of *cultural heritage*, these itineraries create a new system of knowledge, linking many different heritage elements and connecting both neighbouring and distant territories (ICOMOS, 2008).

The innovation introduced by cultural itineraries lies precisely in the phenomenon of human mobility, circulation, exchange, flows of goods and persons, contacts and complex networks between diverse cultures, following routes and channels of communication used for these specific purposes whose ultimate objective is the creation of regional development.

Designed in accordance with effective cooperation processes, the cultural itinerary becomes an instrument of social integration and inclusion. Well-managed on a political level, if conducted by means of internally consistent programmes it plays a competitive role in the tourism market and becomes an important tool of local economic development linked to tourism activities and parallel production chains. On the operational level, the itinerary is composed of three closely connected elements: *resources – planning – territory* (Berti, 2013), and envisages four phases of development, as set out in Figure 1.

Fig. 1 – Development of a tourism itinerary



Source: Presentation by Antonio Barone

The cultural itinerary must be *justified in terms of its content* (i.e. it must have a *meaning*), it can be extended in space on various levels (from the local to the transcontinental), but it must also possess *thematic consistency* and *continuity* in terms of the image and visibility of the route and the destinations. It focuses on the attractions and cultural heritage that express the area's uniqueness and individuality, while linking up with similar elements found along the route. This entails cooperation between local communities and neighbouring regions. The itinerary's various components need to be well-defined and laid out in *planning* terms, but there must also be support for its *conceptual* dimension from the various public and private actors involved in a common project for tourism-based sustainable development. According to Meyer, a central element of the success of a tourism route "is the formation of *co-operative networks among a multitude of often very diverse tourism suppliers*" (cited in Zabbini, 2012, p.64). An important role is played in its management by all local actors

(tour operators, tourist guides, museums, institutions, restaurants, accommodation structures) and the tourists themselves, who are the protagonists of a personalised and unique experience: together they make an important contribution to the co-creation of the route's added value (Zabbini, 2012, p.65).

The tourist guide in particular will be responsible for defining the region's image in tourism terms, linking *the geographical route to its mental dimension* and *the region's resources*. The guide will also need to impress on the tourists the complex mix of *values, associations and beliefs*, often belonging more to the emotional than the rational sphere, that will help them fulfil – in accordance with the desired time-frame and approach – their “dream” holiday (Lozato-Giotart, 2012). This will help to make the journey enjoyable and transform the itinerary into an instrument for social and cultural growth and regional development (Chilembwe & Mweiwa, 2014).

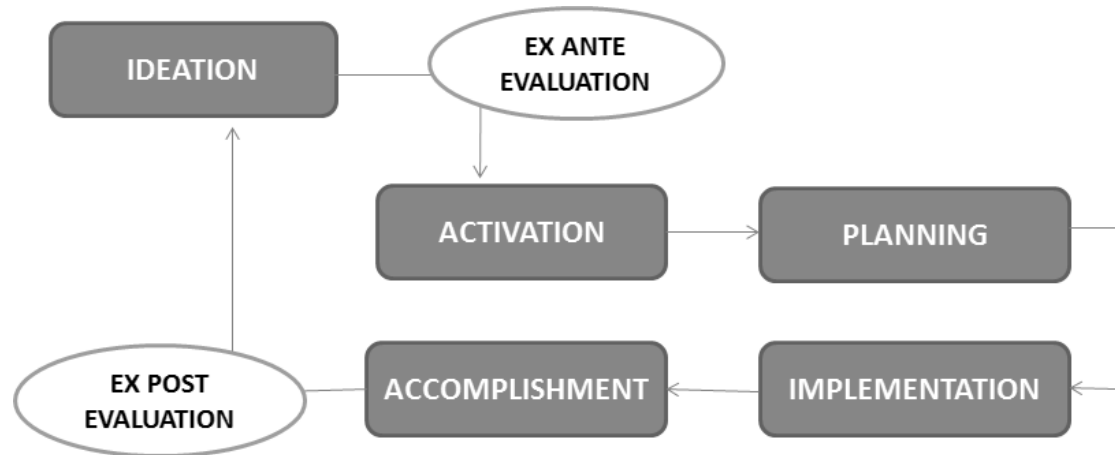
## 2. Management and promotion of the cultural itinerary

Just like any other cultural product, the success of a cultural itinerary depends on the way it is managed and the promotion techniques used, especially those based on new technologies.

Adapting the *systemic management plan* for the activities envisaged in cultural projects to the tourism itinerary, in this case too the resources must be organised in accordance with a continuous process of *planning and control*, taking account of the limits imposed by interdependent factors such as cost, time and quality (Archibald, 1994). The various unknowns and the problems that can arise during the implementation of the cultural programme need to be foreseen, analysed and resolved (Gaio, 2010; Amato, Chiappi, 2007). The project management will thus need to intervene in the itinerary's design and planning phases (taking account of the problems described previously) and, just like any cultural project, the itinerary will be developed over the following five phases (Argano, 2012):

- *(conceptual) ideation*: regarding the project's general characteristics in terms of concept, activities, objectives and content;
- *activation*: regarding the project's feasibility, activation of the organisational components and ex ante assessment, thereby delineating the fundamental structural aspects;
- *planning*: regarding preparation, based on the greatest possible quantity of information, implementation of the event, establishing the tasks to be performed, the resources required, the economic and financial path to follow and the schedule of the activities;
- *implementation (realization)*: putting the project into action following the indications laid down in the previous phase, including monitoring mechanisms;
- *completion*: conclusion of the project, including administration and *ex-post* assessment.

Fig. 2. Phases of the development of a cultural project



Source: adapted from Argano, 2012

These stages may be seen as macro-processes, divided into sub-activities and sub-processes that contain, in turn, numerous interdependent variables, whose dynamics and impacts influence the entire process of development (see Fig. 2). This complexity means that while the structuring of the project's evolutionary phases follows the general description given, it takes on specific meanings depending on the content and purposes of the individual cultural programmes (Argano, 2004; Argano, 2005; Graham, 1990).

Given their interdependence, these phases are not configured as a linear process of succession but are prone to potential overlaps in terms of timing and tasks. In this regard, it should be pointed out that the evolution of the cultural project represents an integral part of the project itself. The evolution of the product depends on demand in the market of reference (Foglio, 2005), in accordance with a timeline that includes a succession of stages from the first steps in the study, planning and implementation of the creative product (i.e. its entire production process), to the phase of development, maturity, decline and finally – in cases where the product has become obsolete – abandonment (Foglio, 2007). This process has strong similarities with Butler's tourism model (1980), which proposes a dynamic analysis of tourism destinations understood as products that evolve over time in accordance with demand. Considering the two models, it should be possible to develop a set of variables that are useful for assessing the feasibility of the cultural itinerary (potentially to be included in a guided tour) and evaluating its sustainability.

In order for this analysis to be effective, it must start from the assumption that a tourist itinerary activates a complex network of relationships between places, people and activities. Every city affected by the thematic route represents a node about which to plan, organise and develop a series of events and activities. This node is in turn connected with the other nodes of the cultural network, taking account of the specific features and functional relations that are activated for each staging post on the itinerary. It is therefore fundamental to establish how to connect the individual nodes in accordance with the distinctive characteristics of the territory and the interests of the

stakeholders involved in various ways in the cultural project. Valid support for facilitating the integration between the city-nodes of a cultural itinerary and optimising the quality of the service is provided by the *System Engineering* approach, which identifies the Project Management activities and procedures to adopt in order to design and manage complex systems throughout their evolution.

### 3. Technology in support of culture

The cultural event, understood as a project, involves a series of coordinated and associated tasks, to be performed over time in view of a given objective. Given the uniqueness of the output derived from these tasks, it is essential to be able to use a model for managing the organisational variables and the problems that can arise during the various phases of implementation. In this sense, technology plays a central role in activating innovation processes linked to the cultural economy. The profound changes in competitiveness in this sector were supported precisely by the introduction of ICT, enabling more effective and efficient management and exploitation of cultural heritage, as well as making it possible to go beyond the logic of conservation alone. Indeed, the recourse to resource management practices and procedures facilitates the simplification and optimisation of processes, services and the production and distribution of cultural content. To innovate the cultural tourism offer, the challenge lies in testing innovative models that have already been successfully applied in numerous market sectors that are subject to shifting business dynamics, on both the supply and the demand sides.

Porter (1985) describes an organisation as a limited combination of processes, in which all the activities are interconnected, generating a 'chain of value'. The recourse to methods based on the logic of processes contributes to the creation of value, facilitating innovation, resource management, the optimisation of activities and services and flexibility in responding to change. Seen in this way, it is possible to obtain a greater degree of effectiveness and efficiency in the management of a tourism/culture project by adopting the company philosophy of '*Design for X*', which has already been used for many years in the industrial field to overcome the limits of serial product design. Specifically, it is a design method that is developed in close correlation with the product's lifecycle: adopting an integrated approach, each phase entails intervention to improve the quality of the product and reduce the time and costs of project implementation. Following this logic then, access to the "lifecycle" of a cultural project enables a redesign of the final tourism product, replanning the itinerary on the basis of the shifting needs of the demand and previous experience. To this end, it is necessary to identify and monitor the processes involved, systematising the multiple variables involved. This will enable the operators to make planning and development choices regarding the guided visit on the basis of concrete data rather than subjective assessments, thereby obtaining a route that can be remodulated in accordance with the resources available and the services to be provided.

In this regard, approaches such as *Business Process Management* (BPM) and *Product Lifecycle Management* (PLM) represent a potential instrument of integrated governance for tourism-cultural heritage belonging to a local system. Indeed, the application of a meta-model based on a logic of processes makes it possible to trace and replicate factors that are critical to the success of the cultural project, and to draw on know-how arising from events held in other regional contexts.

### 3.1 BPM and LPM: Process innovation tools

Information and Communication Technology (ICT) has long played a role in the management of organizational change within companies. Since the early 1990s, many firms have revised their business models in the light of new approaches to market competitiveness, in order to guarantee performance enhancement. Davenport (1993) argues that adopting a process view of business implies doing what is necessary to produce value for the customer. Redesigning a company in favour of process-based organization implies that all activities that logically belong together in terms of creating value for the customer are grouped together. After having redefined the key processes in an organization, a company can start to restructure its organizational units around processes. The next step is to identify new kinds of processes that enable the units to cooperate in an efficient way (Vanhaverbeke, Torreman, 1999). In this regard, Makchrzak and Wang (1996) have shown that simply changing organizational structure from functional units into process-centred departments is not enough to guarantee improved performance in the absence of collective responsibility and a collaborative culture. The processes represent the core of a firm's business because they are the way to achieve objectives and implement strategies. However, not all companies are fully aware of these aspects. Seen as a set of coordinated activities that contribute to value creation in an organization, processes need to be properly planned, scheduled and supported by adequate resources in order to be effectively implemented.

Business Process Management (BPM) guides the organization towards a process-based approach, by means of process modelling, automation, management and optimization. Harmon (2003) defined BPM as a management discipline focused on improving corporate performance by managing a company's business process. BPM makes explicit the quantifiable elements of the processes, including timing, costs and quality indicators, all of which are measurable, enabling collection of performance data. Performance measurements assist an organization in the implementation of its strategy and the achievement of its vision and goals. A measurement system should be a tool for strategy implementation and for organizational change and improvement (Vanhaverbeke, Torreman, 1999).

The Product Lifecycle Management (PLM) approach is strictly related to the strategic vision of a process-oriented organization. PLM helps integrate IT solutions in the different phases of the lifecycle of products and services. It is an *"integrated, information-driven approach comprised of people, processes/practices, and technology,*

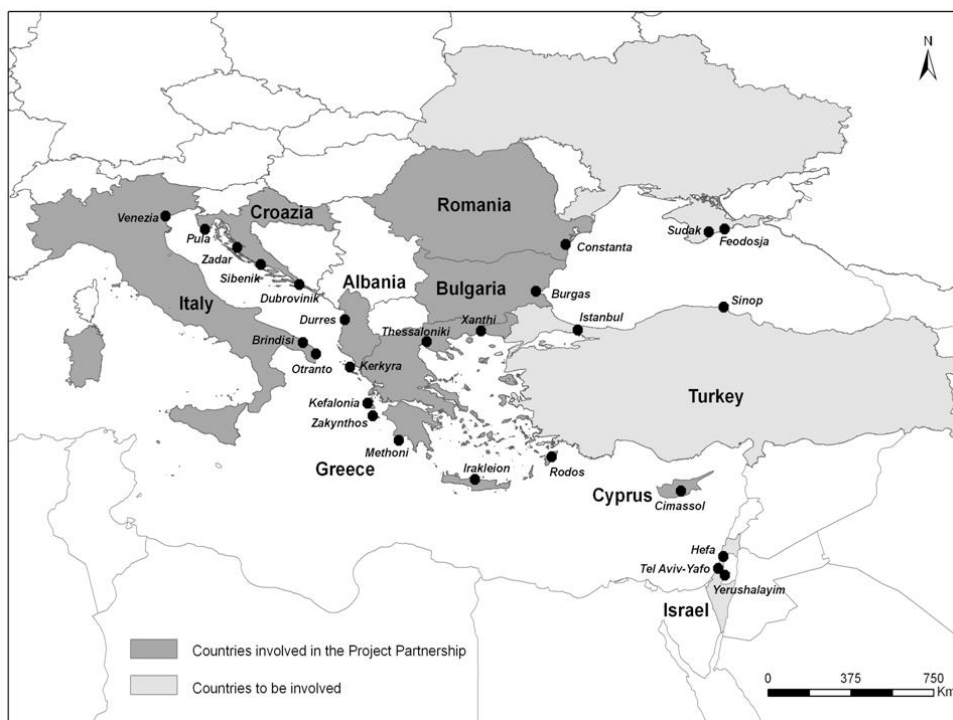
to all aspects of a product's life, from its design through manufacture, deployment and maintenance, culminating in the product's removal from service and final disposal. By trading product information for wasted time, energy and material across the entire organization and into the supply chain, PLM drives the next generation of lean thinking" (Grieves, 2006). Within manufacturing, PLM makes it possible to track the development of a product in real time and to take the right decisions at the right time, based on updated data, saving time, reducing costs and improving the quality of the final product.

Although it involves mostly flows of information and communication, the management of tourism and cultural resources is guided by similar logic to that of other sectors. However, unlike the manufacturing sector, its process dynamics have not yet been extensively studied and research is ongoing (Hervey, Laroche, Bernard, Kerouanton, 2013).

#### 4. Case study: "The ways to Jerusalem: Maritime cultural and pilgrimage routes"

The proposed case study concerns *The Ways to Jerusalem: Maritime Cultural and Pilgrimage Routes*, a cultural itinerary *in fieri* offering an "intercultural" and "intergenerational" journey, understood as a "complex cultural item". It is based on routes indicated in the accounts of warriors, pilgrims and merchants and is broadly composed of two routes that call on the ports of the Black Sea and the Mediterranean (the Adriatic, with future expansion to include more westerly starting points), before heading to Jaffa, Acre and Jerusalem (Fig. 3)

Fig. 3 The ways to Jerusalem cultural route



Source: Graphic by Fabio Mitrotti



The practice of pilgrimage to Jerusalem along terrestrial and maritime routes of cultural and spiritual interest is attested in accounts dating back to ancient times. Identification of the dense and extensive network of roads and paths associated with ancient and medieval mobility has prompted the historical, cultural and anthropological rediscovery of its most important localities.

The proposed itinerary will be developed via terrestrial routes, defined and modelled on the basis of ancient commercial and Christian pilgrimage flows towards the Holy Land, and via maritime routes in the Adriatic Sea, the Black Sea and more generally the Mediterranean, considered as spaces of navigation, mobility, transport and, through their ports, as places of embarkation and landing.

This approach reveals a pronounced complexity, within which it is possible to grasp the historic relations between different geopolitical and economic contexts. The two main objectives are: to recover their memory and their historic, cultural, environmental and economic values; and to promote a process of lasting, sustainable development on the social, environmental and economic level. The itinerary, interpreted as a complex regional project closely connected to heritage and the landscape aims to enhance material and cultural connections among the populations of the ancient *Mare Internum*, providing an opportunity for contact between cultures, in order to re-establish the centrality, not so much of the spaces as of the individuals, in a climate of reciprocal respect and understanding.

*The Ways to Jerusalem: Maritime Cultural and Pilgrimage Routes* is promoted by an International Association called *The Way to Jerusalem: Maritime Cultural and Pilgrimage Routes European Cultural Itinerary*, which was set up with the participation of two national agencies (the *Chamber of Commerce & Industry of Xanthi – Greece* and the *Burgas Regional Tourist Association - Bulgaria*); three cultural associations (the “VIATOR STUDIES CENTRE. *Research and Development of Historical Mediterranean Routes*” and *Europa Progresso* in Italy, and *ANEP Association for New Environmental Policies* in Albania); and two companies (*VEga Form srl* in Italy and *Max&Klosrl* in Romania). It involves many municipalities and prefectures and various public and private organisations, schools, research centres and universities, foundations, and cultural and environmental associations and companies.

The planned activities of *The Ways to Jerusalem* aim to:

- consolidate a wide Cooperation Network in order to develop a cultural and tourist offer based on “The Ways to Jerusalem” routes.
- develop a research programme focusing on history, art and culture from the Middle Ages to the Modern Age, in order to facilitate the development of joint cultural, recreational, social, educational and tourist activities.
- promote the conservation and dissemination of European Cultural Heritage, encouraging joint action for management, restoration and social development.

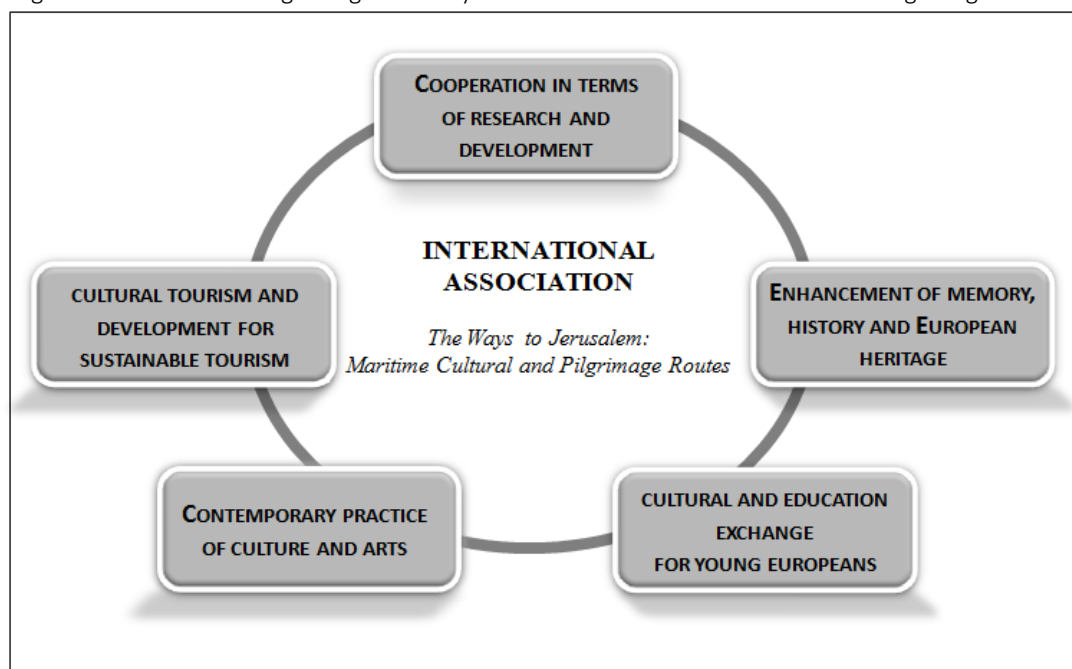
- promote cultural and educational exchange, with particular emphasis on contacts between young people of different regions and countries, creating exchange programs and cultural activities for student groups.
- stimulate the development and circulation of measures to enhance and spread social awareness of contemporary cultural and artistic activities among members of the Cooperation Network applying for European Cultural Route certification, as well as exchanges of this kind with other networks, especially Council of Europe Cultural Routes.
- work positively on the creation of sustainable tourist products aimed at improving the quality of life of the population, creating employment, deseasonalizing tourism, improving the conservation of heritage by using it for specific functions in accordance with its characteristics, and ultimately, exploring the possibilities for the participating towns and regions to create a high-quality tourist and cultural offer. In connection with this, another aim is to create high-quality distinctive features to facilitate the recognition of benchmark cultural and tourist destinations.
- promote understanding and cohesion among the peoples of Europe, emphasising those aspects that help to overcome the religious, social and political conflicts that have marred the history of Europe in the Modern Age, working on aspects that united European society in the Middle Ages and modern times (art, culture, the classical view of Europe), in contrast with religious intransigence and territorial wars.

The strategy guiding the entire project follows the 'bottom up' model and is organized with reference to a sequence of priorities aimed at the development and maintenance of complementary sub-processes such as *research, cultural and educational exchanges, culture and arts and cultural tourism* (Fig. 4).

Since launching the project (in September 2013), the international association has carried out many of the planned measures but much remains to be done.

After having defined the itinerary's geographical focus and identified the staging posts of the route, with the support of a rich scientific and technical-scientific committee, it set up three international agencies responsible for the promotion of the itinerary in the three European seas: one based in Burgas, which manages the Black Sea circuit; another in Xanthi that looks after the route in the Aegean Sea; and a third in Maglie which is responsible for journeys by catamaran and small sailing craft in the Ionian and Adriatic Seas.

Fig. 4 Areas of interest regarding “The Ways to Jerusalem: Maritime Cultural and Pilgrimage Routes”



Source: Our presentation

Benefiting from the collaboration of a broad network of partners (with more than 60 members), it has conducted numerous initiatives of a scientific nature (*Action 1. Cooperation in terms of Research and Development*), organising and participating in numerous international workshops and forums, producing numerous scientific publications (books, papers published in international scientific journals) and other literature aimed at the wider public (brochures, leaflets, booklets, merchandising, as well as setting up a website and a social network) useful for raising interest in the theme of the itinerary (*Action 2: Enhancement of Memory, History and European Heritage*). Also considerable has been the promotion by means of *Educational & Press tours* (in Greece and Bulgaria) and the participation in international tourism fairs (*IFTM Paris-International Fair; Tourism Fair in Bourgas; TT Warsaw International Fair; WTM London-International Fair; ITB Berlin Fair*). Initiatives were started with the universities and schools belonging to the network (*Action 3. Cultural and education exchange for young Europeans*), the latter involved in teaching activities linked to the theme of “travel”. This theme was the object of theatrical representations and musical events (as part of *Action 4. Contemporary practices in culture and arts*). However, the promotion of the itinerary for tourism has yet to take off. This requires the greater involvement of the project partners, especially those responsible for communication and management of the itinerary.

The itinerary requires an effective development, management and promotion strategy, taking account of its implications in terms of tourism sector planning and other economic activities. The potential of the places and regions on the route of the itinerary, the needs of the target clientele, the commitment and capacity in terms of

supply of each partner and the tourist product promotion system as a whole (circuits, information and promotion, marketing and management) all need to be considered and assessed (Trono, 2014a).

#### 4.1. Management of “The ways to Jerusalem” cultural itinerary

In the light of what has been set out thus far, with reference to the above-mentioned evolutionary phases of a cultural project, it is clear that “The Ways to Jerusalem” itinerary is currently in the activation phase. Having established in the conceptual phase the guidelines for its creation – selecting stages, events and the players involved in accordance with the context of reference – the project is currently seeking to define the structural and organisational aspects that best enable the effective implementation and use of the itinerary. Starting from the problems identified in the first steps of implementation and the elements held to be strategic for identifying potential areas requiring intervention, the priority intervention areas were studied closely, together with the variables to be managed by means of the chosen model.

The SWOT analysis (Table 1) highlights the itinerary’s potential, its problems and the strategic elements that are key to its recognition by the Council of Europe, which are in any case necessary for its existence. This step lays the ground for the subsequent phases of planning and implementation, and specifically the creation of a marketing and communication plan.

The implementation of a cultural project and the organisation of one or more cultural events involves a plurality of subjects organised into sub-groups, which, in pursuit of a common objective, intervene and interact in the various operational contexts, associated with four main areas:

- scientific, which includes the conceptual phase, with the preliminary draft of the project;
- technical-organisational, in which the logistic aspects are defined;
- administrative, which encompasses the economic and financial management of resources;
- marketing, including the management of marketing policies and the relative information system (Arceboni, 2009).

Specifically, the analysis of the itinerary in question showed that the project’s main strong points relate to the scientific area, in which the scientific and cultural content of the itinerary, identified in the conceptual phase, are clear and well defined. In contrast, clear problems emerge in the technical-organisational area (logistics, services, etc.), the administrative area (budgeting, reporting, fund raising, etc.) and marketing area (management information, communication channels, forms of promotion, etc.).

Table 1 – SWOT Analysis of “The Ways to Jerusalem” cultural itinerary

Strengths	Weakness
<ul style="list-style-type: none"> <li>• High cultural and historical value of the theme</li> <li>• Distinctive features of historical-cultural heritage in the countries involved</li> <li>• Attractive geographical route, easy to travel</li> <li>• Cohesive and extensive Partnership</li> <li>• Transnationality</li> <li>• Promotion of research and education</li> <li>• Market image</li> </ul>	<ul style="list-style-type: none"> <li>• Lack of a «local» perception of the itinerary</li> <li>• Limited cooperation among the states involved in the cultural itinerary</li> <li>• Insufficient user-territory interaction</li> <li>• Insufficient promotional campaigns and other activities</li> <li>• Inadequate planning and management criteria</li> <li>• Lack of monitoring and coordination among partners</li> <li>• No sharing and archiving of documentation</li> <li>• Insufficient cooperative models able to identify communication, promotion and commercialization strategies linking institutional partners and private actors</li> <li>• Local communities find it hard to recognize and value resources, whether cultural (highly localized and ready to use for social purposes) or human</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>• Large tourist flows to the area involved in the itinerary, an excellent vehicle for publicising the cultural route</li> <li>• Growing attention of the Council of Europe and the international community to cultural itineraries</li> <li>• Growing demand-side interest among tourists in thematic routes as a way of learning about history and common heritage</li> <li>• spread of a logic of international networking for the construction of a distinctive and high-quality tourism product</li> </ul>	<ul style="list-style-type: none"> <li>• Widespread negative economic outlook affecting the trend in tourist flows</li> <li>• Possible geopolitical tensions in the countries involved in the itinerary</li> <li>• Cultural tourism initiatives by competitors who are better able to intercept tourist flows in the regions involved in the itinerary</li> </ul>

Source: Our presentation

In the light of the results obtained, a meta-model for the management of a guided tour was designed. In line with the BPM and PLM approaches, the model needed to be able to manage the complexity of the Project and any problems that emerge. Indeed, the model lends itself to intervention in the framework of project and knowledge management in support of *backend* processes linked to the organisation and management of the route and all the events of which it is composed.

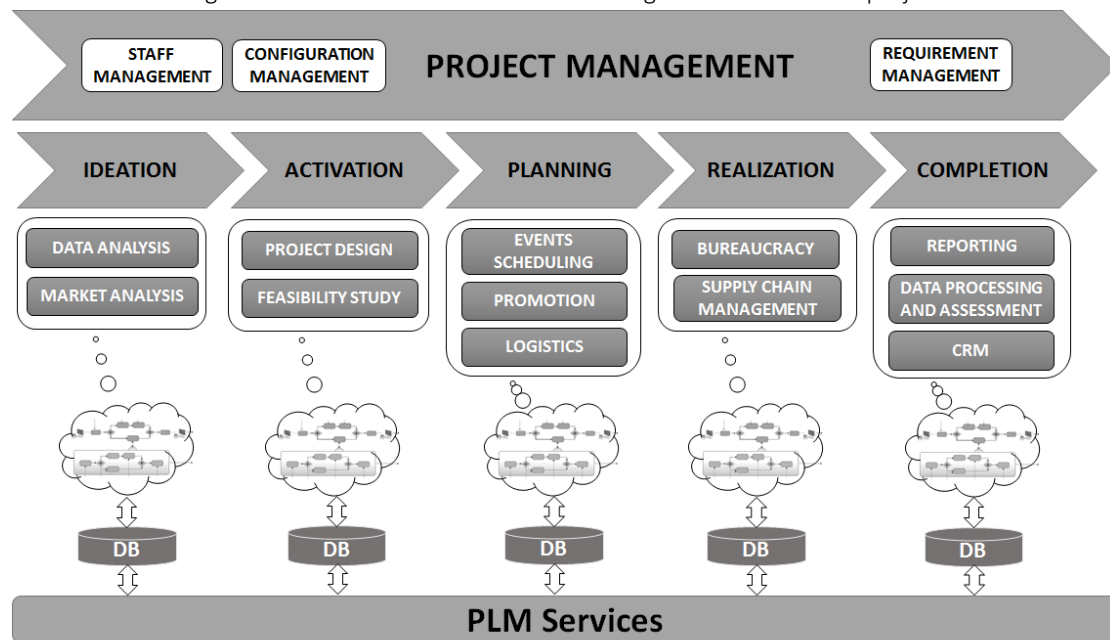
## 5. Management meta-model for guided tours

Considering the itinerary as a single product composed of various routes associated with single events, the application of PLM starts with the modelling of single processes

and sub-processes in the different phases of the lifecycle (AS-IS), making the procedures and technologies explicit.

The next step is requirements analysis, a pre-condition for applying a digital management model to the itinerary and the events and tangible and intangible cultural heritage that are associated with it. The proposed solution has to be scalable and modular, so that it can be adapted to any kind of cultural itinerary and its associated regional resources (tangible and intangible) (Fig. 7).

Fig. 5. PLM-based framework for the management of a cultural project



Source: Our presentation

As stated (Fig. 5), considering the tourist itinerary as a product with different phases, it is possible to list the main processes to be mapped and managed, leading to a number of benefits, eliminating redundant activities and bottle-necks, and highlighting the interactions between partners and the related issues.

- In a manufacturing context, each phase of the lifecycle has specific requirements, due to the heterogeneity of outputs. In tourist itineraries, the stream is composed especially of data and documents; hence, activities regarding project management and Data integration assume great importance.

The Project Management activities focus on the integration and management of the various activities in the different phases, and on the assessment of results. Every active project will be managed via these activities, including:

- *Staff Management;*

- *Configuration Management* (including supply chain management), regarding the differences between the various configurations of the itineraries, borrowing the concept from manufacturing;
- *Analysis and management of requirements* specified by one or more stakeholders.

In the Conceptual Phase, Data Analysis and Market Analysis will produce precious data for the enhancement of the offer. The same information can be used as input for the Feasibility Study in the Activation Phase, aiming to reduce economic risk during the design activities.

In the Planning Phase, the project will be defined in greater detail. At this point, the promotional plan will be decided on the basis of a scientific analysis of the opportunities. The events will be scheduled in order to maximize the offer, saving time and optimizing logistics. At this point, the implementation of an Enterprise Resource Planning (ERP) module will strengthen the relationship with local partners, enhancing the “local perception” of the itinerary. In the Implementation Phase the project will be executed, producing data and feedback that will be reported in the Completion Phase and processed in the Assessment Phase. The data produced in this last phase of the evolution of the tourist itinerary will be the input for the Conceptual Phase of a new project. In the end, the implementation of Customer Relationship Management (CRM) will increase customer loyalty and profitability by enabling new promotional and communication strategies.

Each step of the lifecycle is characterised by a particular process flow, during which a large number and variety of data are produced, requiring access to a shared data repository that contains all the information. The aim is full connection between the different organizational units, the main benefit of which is that it enables central management of the entire itinerary as a single product, offering at the same time the opportunity to change the configuration of the product by removing or adding single events. Furthermore, the management and classification of the historical and cultural information related to the itinerary simplifies communication and the sharing of common history and cultural heritage.

Application of PLM to tourist itineraries will have a positive impact by:

- Strengthening cooperation between the actors involved;
- Eliminating redundant activities and bottle-necks;
- Making it possible to track each document through the bureaucratic process
- Making it possible to generate high-quality tourist products thanks to scientific analysis of feedback throughout its evolution (CRM);
- Planning promotional activities;
- Enhancing communication between partners;
- Strengthening and integrating logistics throughout its evolution (SCM)

Other benefits will arise from the application and the data analysis. The next step is to properly define the processes throughout the lifecycle.

### Final considerations

In the context of a guided tour, an information system designed to enable intervention in each individual process involved makes it possible to achieve better performance and thus a greater degree of *customer satisfaction*. Using the guided tour management model adopted here, each stage of the route (which may be seen as a node in the system) can draw from the unified project database and ensure the consistency of the service and the individual activities conducted as part of the itinerary. This avoids problems caused by non-rational management of the information or incorrect storage of documentation and data: access to a record of events that have been implemented facilitates the planning of future activities and enhances the sustainability of the project in the medium-to-long term. In this regard, one of the greatest limits seen in the implementation of initiatives in the tourism/cultural context derives from the assessment of an event's value, which is hard to quantify or determine due to the difficulty of obtaining reliable and objective data and information. Access to the evolution of the cultural product enables the various strategic activities to be traced. This facilitates assessment of the results obtained and the definition of any corrective measures to adopt, with a view to designing a new cultural project or event on the basis of:

- key factors of success to be replicated,
- problems to avoid,
- *know-how* derived from similar events proposed in other contexts.

From the administrative point of view, a significant advantage associated with this management model in the context of guided tours derives from the achievement of economies of scope associated with the production of multiple alternatives and services prepared *ad hoc* for users and for specific events, distinguishing the project from a standardised offer based on identical factors and undifferentiated products.

In addition, the adoption of integration procedures, such as the reduction of administration and transaction costs, makes it possible to shorten organisation times and achieve a more efficient use of the resources involved. Both the quality of the service and the organisational efficiency have a strong impact on the tourist's perception, heightening the tourism potential of the local attractions included in the guided routes. In this sense, the role of the subjects responsible for the promotion of the cultural itinerary in a given territory is crucial to the success and the sustainability of the project. The synergism between human capital and ICT tools, suitably directed at the management of cultural events in the context of guided tours, represents the key



element with which to raise standards of service, performance and, above all, the quality of the tourist and cultural experience.

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## CONCLUSIONS & RECOMMENDATIONS

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The *4th International Research Forum on Guided Tours* (IRFGT 2015), held in March 2015 at the Estoril Higher Institute for Tourism and Hotel Studies, in Portugal, brought together academic researchers, students, educators and practitioners in the field of guided tours and tour guiding. The event generated fruitful reflection on the subjects of sustainability, empowerment, interpretation and new technologies as well as on the present and future conditions, opportunities and challenges affecting guided tours. The Forum had the pleasure to host three renowned keynote speakers – Noel Salazar, Carles Picazo and Ester Pereira – 38 cutting-edge presentations and 90 participants from 16 different countries who contributed to the promotion of lively debates and discussions. Some of the conclusions and recommendations emanating from those discussions include:

- **Research on Guided Tours** – Despite the recent interest on guided tours, there are still many theoretical issues about guided tours and tour guiding that deserve more thorough investigation such as:
  - The terminology regarding both the typology of tours and the name of the profession, mission, object, and limits of tour guiding;
  - New forms of tour guiding that make use of ICT media and new technologies (e.g. apps, e-books, etc.);
  - Pirate, unofficial and “illegal” tours in relation to licensing.
  
- **Wider Involvement in the Discussion, Organisation and Management of Guided Tours** – All tourism stakeholders should be involved in the reflection, organisation and management of guided tours. Besides researchers, academics, practitioners and students, also local communities, tourists and the public and private sectors need to be involved in order to provide an offer of guided tours that corresponds to the needs, expectations and overall improvements of the sector. Regional R&D clusters could develop knowledge that supports the local and regional guide practice and at

the same time develop partial contributions to possible “grand theories” of tour and tourist guiding.

- **Towards a More Widespread Definition of the Profession** – Another aspect emphasised was the need for further debate on the role of local, regional or national tour(ist) guides and tour managers, who work at an international level. In some countries, the profession is oriented by specific national regulations, whereas in other countries there are no regulations at all. Labour conditions and challenges must be debated and improved while the profession and role of tour guides must be clearly and carefully defined and respected at the same level worldwide.
- **Inclusive Guided Tours** – Further research and development of guiding strategies for children and young people as well as niche markets, and accessible tourism for people with different physical and intellectual impairments was highly recommended so as to make tourism a more inclusive activity.
- **Changes in the Demand for Guided Tours** – Different changes in the demand for guided tours can be discernible in recent years and future trends need to be analysed, namely in relation to increasing numbers of tourists from emerging markets (e.g. BRIC). This will necessarily influence the current offer of guided tours in many countries.
- **Sustainability in Guided Tours** – It was suggested that a wider offer of guided tours that are (environmentally, economically, socially and culturally) sustainable is also needed. Some examples of initiatives, projects and on-going guided tours were presented at this level and contributed to broaden the reflection on existing and future best practices in tour guiding. To offer these guided tours, students first need to understand the principles of sustainability and how to contribute to their development. In other words, they need training in sustainable development/sustainability. Besides, students need to be trained so that they bring these principles into the work place – tours, hotels, restaurants, public sector tourist offices, visitor centres – to mention a few. This is the only way for sustainability to take root. Once informed and aware of the principles of sustainability students (future professionals) will become the agents of change in the work place.

A special issue of the *Scandinavian Journal of Hospitality and Tourism*, to be published in autumn 2016, will also be dedicated to the IRFGT 2015, guided tours and tour guiding.

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