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# Visitor Management in Tourism Destinations

Edited by Julia N. Albrecht



# VISITOR MANAGEMENT IN TOURISM DESTINATIONS



## **CABI Series in Tourism Management Research**

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# VISITOR MANAGEMENT IN TOURISM DESTINATIONS

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Edited by

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*University of Otago, Dunedin, New Zealand*



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# **Part I Introduction and Foundation**

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# 1

## Introduction to Visitor Management in Tourism Destinations

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### 1.1 Conceptualizing and Explaining Visitor Management

Visitor management (VM) is practiced, explicitly and implicitly, within every destination, at every attraction, accommodation and tourism transport option. It considers such different issues as tourist facilities, gateways and orientation, transport routes and visitor flows, guiding and interpretation. Accordingly, a varied range of stakeholders at different levels in tourism management exercise interests in VM. These can include public sector organizations such as local government agencies or regional tourism organizations, (tourism) businesses or business advocacy groups devising VM strategies for the attractions and activities that they offer or manage, local resident groups, and non-governmental and third sector organizations, among others. VM can be subject to legal regulations or statutory frameworks, for example activities in protected areas, risk management in adventure tourism, or VM at UNESCO World Heritage Sites. Unregulated VM refers to VM interventions in museums or guided hikes on private lands.

Possible benefits of its implementation are to raise the profile and improve the quality of tourism products, to inform visitors of facilities, services and infrastructure, to aid in the dispersal of visitors, to manage and/or modify visitor behaviour, often in order to mitigate negative visitor impacts, and to positively impact visitor experiences through guiding and interpretation. Despite these potential benefits, VM receives relatively little attention in current research and even comprehensive practice guidelines for tourism destination management practitioners are scarce (with the notable exception of Spenceley *et al.* (2015) for the context of protected areas). Indeed, VM is under-theorized and lacks a widely accepted definition. To illustrate, (tourism) management tools related to pricing (e.g. differential pricing or revenue management), education and interpretation, and visitor flow and access

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management tend to be discussed in isolation but they are rarely identified as potential components of an overall strategic approach to managing visitors in a destination. VM is also not well contextualized. Its role in destination management and potentially overlapping responsibilities of the public and private sectors are seldom acknowledged and not understood. This book applies an inclusive description of VM, and all the above factors inform the following definition: visitor management refers to all management tools and interventions that regulate the movement and behaviour of visitors in a destination. Visitor experience and appreciation are shaped by these interventions.

Indeed, VM interventions profoundly shape visitor experiences, and they are at the core of tourism management. They encompass a wide range of activities on the part of the tourism manager, yet the attention that VM receives in tourism planning as well as tourism research does not reflect this significance. Such lack of attention or focus can be problematic where inappropriate VM decreases the perceived quality of otherwise high-end tourism products (Garrod *et al.*, 2006). It is also common for destinations and tourism attractions to develop and implement one VM strategy that covers different products as well as various visitor types (e.g. Queensland Parks and Wildlife Service, 2007). Such comprehensive approaches have the advantage that they address a wide range of possible situations or events. They are desirable in circumstances where 'hard' VM approaches such as crowd control or risk management are necessary to prevent negative impacts on the resource or the visitors themselves (Mason, 2005). However, aspects of VM that are predominantly concerned with the management of the visitor experience or product, such as the provision of information or interpretation through signage, must be considered in a more differentiated way. Mehmetoglu (2007, p. 659) suggests that 'not everyone who visits a nature-based attraction is interested purely in nature-related activities'. Indeed, as visitor types differ in their expectations, they will differ in their management requirements and, ultimately, their response to, and appreciation of, VM interventions.

These issues receive sparse attention in the tourism management literature. Existing work on VM can be categorized into three main themes. Case studies in VM research typically focus on destinations or types of destinations (Shackley, 1998; Wachowiak, 2005), attractions (such as theme parks (Milman, 2001; Braun and Soskin, 2008), zoos (Ryan and Seward, 2004), or museums (Gilmore and Rentschler, 2002), or tasks closely associated with VM such as guiding and interpretation (Ap and Wong, 2001; Pastorelli, 2003; Hughes *et al.*, 2013), or risk management (Parkin and Morris, 2005). Case studies are useful in that they identify and discuss VM requirements in certain contexts. However, they tend to contribute little to an overall understanding or theorization of VM.

Another set of VM studies is concerned with visitor flows and simulations of visitor movement and behaviour. Technological advances in problem-solving and on-going management of visitors are relevant to a number of fields including tourism (Lawson, 2006), heritage management (Buhalis *et al.*, 2006), geography (Beeco and Brown, 2013), conservation (Cole and Daniel, 2003) and biology (Coppes and Braunisch, 2013).

The third theme, impact studies, is not necessarily perceived as a part of VM studies but is closely related in that it identifies and specifies areas or situations in

need of VM. The relevant literature (e.g. Mason, 2003; Ryan, 2003; Garrod *et al.*, 2006) assumes that adequate VM strategies can successfully mitigate negative impacts of visitation on a site. Further, impact studies supply information (such as visitor data) that can be critical in VM planning (e.g. Cole and Daniel, 2003; Coppes and Braunisch, 2013).

Effective management of a destination or visitor attraction is dependent on various supply-side factors (Garrod *et al.*, 2006) related to the attraction type and the nature of the resource (Benckendorff and Pearce, 2003). Wall (1997), for example, classifies tourism attractions according to 'points, lines and areas', thus emphasizing physical characteristics of the resource and their relevance for attraction planning and management. Kim and Weiler (2013) on the other hand highlight the significance of demand-side factors, environmental attitude in particular. The literature on guiding (Ap and Wong, 2001; Bowie and Chang, 2005) suggests additional demand-side factors related to visitor expectations with regard to service, service quality and product image that can be relevant in VM planning. Increasing visitor expectations of service, declining (public) funds, limited staff skills, challenges in balancing conservation values (Fennell and Weaver, 2005) and access are all identified as challenges in VM (Leask, 2010). Addressing management needs associated with the geography of a destination or attraction can be difficult, but the greater challenge lies in addressing management requirements resulting from demand-side factors. Different types of visitors behave differently and, consequently, necessitate a variety of potentially conflicting VM interventions.

Leask (2010, p. 168) suggests that visitor attraction research should 'develop tools to establish and evaluate how individual [visitor attractions] can adopt appropriate management practices for their resource, visitors, individual property and stakeholders'. This may be challenging for tourism managers, but it is one instance where closer exchange between academics and practitioners promises to be productive. In the words of Brown *et al.* (2010, p. 880): 'A substantial challenge commonly faced by managers is that they have not been given theoretical frameworks for analysing visitor behaviour [...]'.

## 1.2 Book Aim and Content

This book considers VM as a component of destination management at all levels of a destination and involving a wide range of stakeholders. It aims to demonstrate current knowledge on VM and to provide insights into conceptual issues rather than providing merely descriptive case studies. This book is primarily aimed at post-graduate students and researchers as it seeks to provide specialist perspectives on the state of the art of important aspects of and issues within VM.

The introduction and foundation chapters in Part I provide the context for the book as well as the broader topic of VM. Part II considers critical concepts and influential factors in VM while Part III illustrates current issues. Where case studies are included these are research-based and they contribute to our overall understanding of core issues in VM. Part IV of the book covers the state of the art in guiding and interpretation, followed by concluding thoughts and an overview of current issues and future research directions.

### 1.3 Content and Overview

The fact that VM is seen as part of overall destination management rather than a management task in its own right may arguably account for the relative lack of VM-specific research. Chapter 2 systematically explores this relationship by investigating and comparing the goals, policies and implementation activities associated with destination and visitor management. By bridging the two streams of literature, this chapter thus lays an important foundation for the appreciation of VM research at the different levels of a destination in this book. In providing the foundation for the consideration of visitor experiences, Chapter 3 has a similar role in this book. Arguing that visitor attractions comprise objects, people and places that are perceived differently by the various target markets, the authors emphasize the challenging nature of visitor attraction management. Several conceptual frameworks relating to visitor experience management are examined with a view to identifying beneficial factors. Chapter 4 is the final chapter in the foundation section. It examines factors that are simultaneously part of the external and internal business environments, namely social and political aspects of the host culture, destination and community. Demonstrating how social and political conditions influence the selection of VM interventions, it addresses factors that, to date, have been largely neglected in VM research. Furthermore, Chapter 4 is one of the relatively few studies of tourism management in the Middle East – Iran specifically – published in the English language.

Part II comprises three chapters exploring critical concepts in VM. Chapter 5 examines possible applications of indicators and standards-based VM frameworks at cultural heritage sites. It is argued that if implemented successfully VM can help to achieve sustainability in heritage tourism. Indicators and standards are suggested as means to identify and negotiate the fine line between the visitor experience and resource protection. Chapter 6 links VM to the concept of service quality. It argues that in nature-based tourism there is a direct relationship between VM, service quality, visitor satisfaction and repeat visitation. Chapter 7 introduces the concept of visitor affinity to the VM literature. In line with Mehmetoglu's (2007) statement quoted above, the authors state that protected areas attract visitors for different reasons. Visitor surveys and monitoring can help identify visitors' affinity-relations, thereby providing opportunity for differentiated and effective VM. The chapter then illustrates possibilities and limits of segmentation according to visitors' affinity.

Current issues and challenges in VM are the theme of Part III. Chapters 8 and 9 are the only chapters in this book that also touch on the topic of visitor impact management. Chapter 8 traces the implementation of a systematic 'best practice' approach that applies and tailors a United States Forest Service methodology for visitor monitoring to a region in the Brazilian rainforest. As such, the chapter shows how well established management methods can be transferred and adapted to a different context in order to improve visitor (impact) management. Chapter 9 is also concerned with visitor impacts, though it draws heavily from an urban (mass) tourism context. Exploring tourist behaviours, vandalism and related stakeholder responses, the chapter considers tourist value systems insofar as they influence tourist behaviour as well as unintentional behaviour that results in site damage. Chapter 10 draws attention to the use of innovative technologies in visitor management, visitor experiences specifically. Considering existing uses of augmented reality applications



in mostly Western contexts, challenges for its implementation in emerging tourism destinations are identified.

The four chapters in Part IV address guiding and interpretation, and their roles and relevance in VM. Chapter 11 on the operationalization of guided tours reports on empirical research conducted in 31 museums covering more than 70 types of guided tours therein. Chapter 12 focuses on heritage interpretation in the context of film tourism. The preparation and design of information and interpretation material are identified as crucial issues in VM, among other things. The chapter argues that heritage interpretation can be a valuable VM tool as well as an essential part of the overall quality of visitors' experiences. Arguing that learning is by no means confined to a classroom, Chapter 13 provides an original account of theories of learning and their possible applications in interpretation. Chapter 14 critically reflects on possible roles of interpretation in VM. Considering relationships between interpretation and other forms of communication, as well as the changing management functions of interpretation over time, it is posited that some aspects of interpretation in particular are related to positive outcomes for the visitor experience as well as the destination. Finally, Chapter 15 provides a summary and conclusion as well as identifying further research needs.

## 1.4 Conclusion

This book aspires to address the significant gap in VM research. The combination of theory and case studies is intended to demonstrate our current knowledge as well as identifying the research gaps still in existence. As such, this book goes beyond destination-specific content and delivers analytical insights, theoretical advances and concluding thoughts on further related research needs and areas.

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# 2

## Destination Management and Visitor Management: Non-convergent Literatures but Complementary Activities and Issues

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The connections between destination management and visitor management (VM) should be immediately apparent. Destinations are places that attract visitors and the shared notion of management implies that both destinations and visitors can be managed in order to achieve particular goals through policies and actions. It follows then that these goals, policies and actions might overlap, that destination management might incorporate aspects of VM. In practice these connections are less evident and explicit. Though intrinsically linked, two largely non-convergent streams of literature on destination management and VM have developed, with limited research from either perspective that examines how managing visitors fits into the broader management of destinations. This chapter seeks to bridge the two streams by analysing these relationships more systematically and showing how the two are complementary and should be mutually reinforcing. As specific aspects of VM are dealt with elsewhere in this book only the most salient points are outlined here while a fuller account is given of destination management.

### 2.1 Visitor Management

Visitor management is the more established of the two streams of literature. A steady flow of studies emerged in the 1980s and 1990s as growing visitor pressure on historic cities and in protected areas gave rise to research and policies that acknowledged the impacts that the growth in visitor numbers was having and proposed measures to deal with this, commonly based on notions of carrying capacity and related concepts (Glasson *et al.*, 1995; Newsome *et al.*, 2013). In addition to coping with increasing

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pressures, attention was later given to improving the visitor experience. For example, the objective of the Stratford-upon-Avon Visitor Management Action Programme was:

To enhance the welcome and services we provide for our Visitors and improve the management of the impact of Visitors on the local community in the Town, in order that Tourism can be developed as a positive force in harmony with the local environment.

(Hicks, 1995, p. 5)

Similarly, McArthur and Hall defined VM in the context of heritage management as:

the practice of ensuring visitors achieve a quality sustainable experience; it is the management of visitors which maximises the quality of the visitor experience while assisting the achievement of the area's overall objectives.

(McArthur and Hall, 1996, p. 37)

With reference to natural area settings, Glasson *et al.* state:

Visitor management seeks to influence the amount, type, timing and distribution of use as well as visitor behaviour. Actions include regulating visitor numbers, group size and length of stay, using deterrence and enforcement, communicating with visitors and providing education.

(Glasson *et al.*, 2013, p. 270)

Several of these studies recognize that VM, in both natural and urban settings, needs to be related to other policies and actions. Newsome *et al.* (2013) distinguish between two complementary approaches to managing visitors in natural areas: VM and site management. The former is direct while the latter, concerned with the location and management of facilities and site restoration, is indirect. Hicks (1995) outlined the relationships between Stratford's town centre management strategy and the VM action programme. In reference to Cambridge, Human (1994, p. 221) suggested: '... questions ought to be raised over whether visitor management plans should be conceived as separate entities: certainly they cannot succeed in isolation'. He contends that 'the aim must be to expand the zone of influence over policies affecting tourism in the destination' and then goes on to outline a range of policies at different scales that might be related to VM in the city.

## 2.2 Destination Management

The first studies on destination management appeared in the 1990s (Laws, 1995; Crouch and Ritchie, 1999) but it is only in the last decade that a distinctive – if still fragmented – body of literature has emerged, as an earlier emphasis on development has been complemented by a more recent and concerted concern with managing the growth of tourism and ensuring destinations are sustainable and remain competitive (Jamieson, 2006; WTO, 2007; Wang and Pizam, 2011; Morrison, 2013).

Destination management, in theory and in practice, is complicated by the lack of a widely accepted definition of what a destination is. Three commonly recurring characteristics identified by Pearce and Schänzel (2015) in their review were that destinations:

- consist of a set of activities, attractions, attributes, experiences, products or services;
- have a significant geographical dimension; that is, destinations are associated with particular locations, areas, regions or spaces at a range of scales from the

- local to the macro-regional, with debate occurring over whether the boundaries of destinations are fixed or fluid, administrative or functional; and
- are commonly defined from either a demand or supply perspective in which the first two groups of characteristics are seen either in terms of the tourists' needs, perceptions and experiences or with regard to the multiple private sector providers and relevant public sector organizations who offer a range of products and services.

Taking a more conceptual approach, Pearce (2014) developed an integrative conceptual framework of destinations by synthesizing the key elements of five major sets of concepts used to depict and analyse destinations: industrial districts, clusters, networks, systems and social constructs. The interrelationship of the elements identified suggest that a destination might be conceptualized more fully as: 'a dynamic, geographically based mode of production which provides interdependent and complementary products to tourists and transforms the spaces and places in which this production occurs' (Pearce, 2014, p. 149).

The various features of this conceptualization have significant implications for the way in which destinations are managed. Firstly, the framework draws attention to the place and space characteristics of the destination: it recognizes that these differ from destination to destination, that both internal and external relationships are important and that the degree of geographical embeddedness of tourism is a particularly influential factor in how destinations are managed. Secondly, destinations are dynamic not static; tourism evolves over time as the sector changes and is changed by the places and spaces in which it develops. Thirdly, the notion of a destination as a mode of production suggests it might be managed and that such management will be both necessary and complicated by the interdependence of the multiple services and products offered to tourists.

There is surprisingly little explicit reference to the broader management literature in destination management studies (Longjit and Pearce, 2013) but analysis of how the term is being used there suggests it might be framed along four major inter-related dimensions, which have a distinct managerial connotation (Table 2.1). While the specific terminology varies, the central thrust of the first dimension is that of a process or approach that embodies the need to manage the diverse facets of a destination outlined above. This is most commonly expressed in terms of coordinating and integrating the management of supply and demand, functions and resources and/or involving the collaboration, cooperation and interrelationships of relevant agencies or stakeholders. The second dimension concerns the purpose and goals of destination management. These vary in their specificity or generality. Multiple goals are often cited, the most frequent of which are to serve visitors' needs; to ensure balanced and sustainable management; and to secure the long-term competitiveness of the destination. With regard to the third dimension, there is general agreement that destination management involves multiple activities and functions. The number and type of these vary from study to study but most frequently relate to destination marketing, positioning and branding; destination planning, monitoring and evaluation; product development; resource stewardship and environmental management; research; and various aspects of VM. A fourth dimension is the organizational structure(s) that facilitates or enables these activities to be undertaken so that the goals can be met.

**Table 2.1.** Dimensions and elements of destination management.

<b>Key references</b>	
<b>Concept/approach</b>	
A process involving the coordinated or integrated management of supply and demand, functions and resources, destination mix	Anderson, 2000; Pechlaner, 2000; Welford and Ytterhus, 2004; Minguzzi, 2006; WTO, 2007; Rygllová, 2008; Laesser and Beritelli, 2013; Longjit and Pearce, 2013; Morrison, 2013
The collaboration, cooperation or interrelationships of relevant agencies or stakeholders	Welford and Ytterhus, 2004; Harrill, 2005; Rygllová, 2008; Longjit and Pearce, 2013; Morrison, 2013
A strategy of development/strategic approach	WTO, 2007; Rygllová, 2008; Dredge <i>et al.</i> , 2011
A set of controlling measures and tools used for planning, organizing, and decision-making	Rygllová, 2008
A combination of approaches to growth management	Bramwell, 2007
A proactive, visitor-centred approach to the economic and cultural development of a destination	DMAI, 2008
<b>Goals/purpose</b>	
Attract visitors, meet needs of visitors, maximize visitor satisfaction, serve visitor demand	Buhalis, 2000; Pechlaner, 2000; Fuchs and Weiermair, 2004; Zehrer <i>et al.</i> , 2005; Pechlaner <i>et al.</i> , 2008; Laesser and Beritelli, 2013; Longjit and Pearce, 2013
Balanced, sustainable administration or management of the well-being of the destination	Fuchs and Weiermair, 2004; Magas and Basan, 2007; WTO, 2007; Rygllová, 2008; Dredge <i>et al.</i> , 2011; Ritchie and Crouch, 2011
Secure long-term competitiveness	Crouch and Ritchie, 1999; Dwyer and Kim, 2003; Magas and Basan, 2007; Pechlaner <i>et al.</i> , 2008; Ivaniš, 2011
Assess and enhance core and supporting resources and attractions	Crouch and Ritchie, 1999; Fuchs and Weiermair, 2004; Hawkins, 2004; Ritchie and Crouch, 2011
Adapt to constraints	Crouch and Ritchie, 1999; Ritchie and Crouch, 2011
Achieve common goals or destination goals	Longjit and Pearce, 2013
Create a positive tourism atmosphere and enhance destination identity	Longjit and Pearce, 2013
Enhance the long-term prosperity of local people	Buhalis, 2000
Maximize profitability of local enterprises and maximize multiplier effects	Buhalis, 2000
Create a unique tourist product of the destination	Ivaniš, 2011

Continued

**Table 2.1.** Continued.

	<b>Key references</b>
Avoid duplication of effort ... and identify any management gaps	WTO, 2007
Achieve significant change	Welford and Ytterhus, 2004
Intervention to address market failure	Laws, 1995
<b>Activities/functions</b>	
Destination marketing, branding and positioning	Crouch and Ritchie, 1999; Anderson, 2000; Harrill, 2005; Jamieson, 2006; WTO, 2007; Ryglová, 2008; Pechlaner <i>et al.</i> , 2009; Laesser and Beritelli, 2013; Longjit and Pearce, 2013; Morrison, 2013; Pearce and Schänzel, 2013
Destination planning, monitoring and evaluation	Crouch and Ritchie, 1999; Dwyer and Kim, 2003; Fuchs and Weiermair, 2004; Jamieson, 2006; WTO, 2007; Ryglová, 2008; Laesser and Beritelli, 2013; Morrison, 2013
Product development	Jamieson, 2006; WTO, 2007; Pechlaner <i>et al.</i> , 2009; Ivaniš, 2011; Risteski <i>et al.</i> , 2012; Laesser and Beritelli, 2013; Morrison, 2013
Resource stewardship, environmental management	Crouch and Ritchie, 1999; Dwyer and Kim, 2003; Pavlovich, 2003; Fuchs and Weiermair, 2004; Ryglová, 2008; Risteski <i>et al.</i> , 2012; Longjit and Pearce, 2013
Visitor management, managing the visitor experience, adventure risk management, safety management	Crouch and Ritchie, 1999; Anderson, 2000; Pavlovich, 2003; Risteski <i>et al.</i> , 2012; Pearce and Schänzel, 2013; Longjit and Pearce, 2013
Research, information management and knowledge-building	Crouch and Ritchie, 1999; Anderson, 2000; Pavlovich, 2003; Harrill, 2005; WTO, 2007; Morrison, 2013
Human resource development, training	Dwyer and Kim, 2003; WTO, 2007; Longjit and Pearce, 2013
Relationship building	Crouch and Ritchie, 1999; Dwyer and Kim, 2003; Jamieson, 2006; WTO, 2007; Morrison, 2013
Specific decisions and actions	Hawkins, 2004; Sainaghi, 2006
Organizational responsibility, leadership and partnership	Crouch and Ritchie, 1999; Anderson, 2000; Jamieson, 2006; Risteski <i>et al.</i> , 2012
Implementation of the policy and planning framework	Ritchie and Crouch, 2011
Destination and site operations	Jamieson, 2006
Lobbying	Laesser and Beritelli, 2013
Service coordination	Laesser and Beritelli, 2013
Information provision	Pearce and Schänzel, 2013
Regulating and channelling tourism pressure	Laws, 1995
Managing phases in the life cycle of a district (e.g. relaunch or start-up)	Sainaghi, 2006

*Continued*



**Table 2.1.** Continued.

<b>Key references</b>	
Managing particular problems (e.g. carrying capacity)	Sainaghi, 2006
Business support	WTO, 2007
<b>Organizational structure</b>	
Destination management organization; organizational and management operations; institutional and regulatory settings	Crouch and Ritchie, 1999; Dwyer and Kim, 2003; Jamieson, 2006; WTO, 2007; Laesser and Beritelli, 2013; Longjit and Pearce, 2013; Morrison, 2013

The literature focuses on the nature and structure of DMOs (destination marketing and/or management organizations) but local government and other public and private sector organizations may also be important.

Furthermore, these four dimensions are interrelated. An approach is followed to achieve some purpose or set of goals, the pursuit of which requires multiple functions to be carried out; this in turn necessitates some form of organizational structure that seeks to bring about the necessary integration of supply and demand. This interconnectedness is most evident in the more comprehensive definitions and conceptualizations, such as that by the WTO:

Destination management is the co-ordinated management of all the elements that make up a destination (attractions, amenities, access, marketing and pricing). Destination management takes a strategic approach to link these sometimes very separate entities for the better management of the destination. Joined up management can help avoid duplication of effort with regards to promotion, visitor services, training, business support and identify any management gaps that are not being addressed.

(WTO, 2007, p. 4)

### 2.3 Destination Management and Visitor Management

What then are the differences and commonalities between destination and VM and how might they be interconnected? A first and obvious distinction might be made between what is being managed. As the terms indicate, the focus on VM is on managing the visitor whereas destination management is a much broader concept that takes a more comprehensive approach to managing the destination as a whole, both in terms of scale and with regard to the fuller range of supply and demand elements and by extension a wider spectrum of stakeholders. Much VM is site related (see Chapters 5, 8 and 12). Sites vary in nature and scale but are taken here to refer to particular locales or venues such as historic buildings, museums, attractions, beaches, parks, neighbourhoods or natural areas that are the focus of tourist activity and localized management action. Each individual site constitutes only part of a larger destination or even just part of a district or zone within the destination (Pearce, 1998, 1999). Case studies of VM in historic cities may consider city-wide patterns of

demand and measures to limit overall demand or to redistribute visitors throughout the city, for example the chapters on Oxford and Venice in Glasson *et al.* (1995), the work on Stratford (Hicks, 1995), Cambridge (Human, 1994) and on historic walled towns in Europe (Brezovec and Bruce, 2009). Visitor management measures may include local transport initiatives, new product development or information provision to spread demand but, despite reference to wider plans and policies, VM strategies and actions do not seek to deal comprehensively with all aspects of managing the destination, such as the provision and impact of accommodation, transport, attractions and infrastructure; as such, these studies have not been framed in terms of destination management.

Conversely, VM is but one component of destination management plans. For instance, the Glacier Country destination management plan, which covers Westland National Park and the adjoining communities of Franz Josef and Fox Glacier in New Zealand, addressed five priority areas under the broader umbrella of destination management: product quality, tourism support services, community services, infrastructure and marketing (Tourism Resource Consultants, 2009, p. ii). While the 'agreed single most important objective for Glacier Country [...] to enhance and sustain the visitor experience in the glacier valleys' is addressed under product quality actions to be carried out in the national park itself, attention is also directed at a range of measures in the two gateway communities to deal with broader issues supporting the operators, residents and, indirectly, the visitors. More detailed VM policies and measures are also outlined in the park's management plan alongside others dealing with such matters as mining and the preservation of flora and fauna (DOC, 2008).

Other comparisons and contrasts between the two forms of management can be developed around the four dimensions of [Table 2.1](#). In terms of the first dimension, the core literature presents destination management as an upper-level over-arching activity that coordinates a set of stakeholders and lower-level functions. While this is the approach taken here, this perspective is not universally accepted, particularly by some proponents of destination marketing who see that as a separate and by no means subordinate activity to destination management (Pike and Page, 2014). This debate has not emerged in terms of visitor and destination management, perhaps because of the non-convergence of the two streams of research or a tacit acknowledgement that managing visitors is but one part of a bigger picture of destination management. With regard to the second dimension, there is much common ground with the goals of visitor and destination management. Variations in emphasis occur between the streams and from one study to another, but there is a mutual concern with delivering a quality visitor experience while fulfilling environmental, economic or community-directed goals.

Although delivering a quality visitor experience is a common goal of destination management, VM is but one of the multiple functions listed in [Table 2.1](#), and not the most frequently cited. Indeed, VM is not indexed at all in some recent volumes on destination management (Wang and Pizam, 2011; Morrison, 2013) and receives only scant or indirect mention in others (Jamieson, 2006). Other destination management studies do, however, link VM directly with the visitor experience. They emphasize that the quality of the experience and overall satisfaction of a trip depends on all its different elements, including travel to and from the destination as well as all services and products while there. This comprehensive approach may be expressed in terms

of a value chain or travel experience chain (Ritchie and Crouch, 2003; WTO, 2007). Ritchie and Crouch note that as some of the pre- and post-trip elements and links lie outside the destination:

All that a given manager can realistically do on a daily basis is to focus on ensuring that as many as possible of the experience links within his/her destination deliver what they promise. From a longer-term, broader perspective it is thus clearly important that all destination managers work together in an attempt to deliver an industry-wide quality travel experience.

(Ritchie and Crouch, 2003, p. 214)

They then go on to assert that 'It is only through cooperation and coordination that is provided by [...] leadership organizations that the sector can hope to strengthen the highly interdependent links of the travel experience.' In other words, a destination-wide approach to VM is needed, one that goes beyond the management of individual sites, products or services. Moreover, delivering a quality visitor experience may also involve other related destination management functions such as quality assurance (e.g. through accreditation systems to ensure visitor safety); workforce development to provide adequately trained staff and working with destination communities to foster positive host-guest encounters (WTO, 2007).

Taking a destination-wide approach also highlights why specific VM issues arise, why particular actions are taken and why measures to control access are often emphasized in destination management as well as in the management of visitors to historic cities and other urban areas discussed earlier (Glasson *et al.*, 1995; Hicks, 1995; McArthur and Hall, 1996; Ritchie and Crouch, 2003; WTO, 2007). A common issue here is managing the intra-destination movement of visitors as they move around the destination, for example from points of arrival to accommodation or from one attraction to another. The goals here may be to enhance the visitor experience by making such flows as easy or interesting as possible, to spread the economic impacts throughout the destination or to reduce pressures on heavily visited areas. Intra-destination or inter-site movement may bring visitors into greater contact with residents and other users of public open spaces, footpaths, roads and various modes of transport, causing congestion and other pressures. Much VM at this scale often concerns signage and managing pedestrian flows, vehicular traffic and parking, particularly for tour coaches, but other measures such as information provision might also be undertaken. It can present many challenges due to the very dynamic nature of visitor behaviour and the less constrained environment between sites – visitors wandering the streets of a city are less readily managed than those in a museum or theme park. In sites where extreme visitor pressures occur, such as Venice, attempts may be made to control visits to the destination, particularly of excursionists whose economic impact is less than that of overnight visitors (van der Borg, 1998). The number and scale of cruise ships arriving in Venice has also added significantly to the visitor pressures there (France, 2011).

Although by no means as dramatic as the situation in Venice, the seasonal and daily fluctuations in demand resulting from the recent increase in cruise ships and their passengers in New Zealand have also required a destination-wide response to VM when an additional two thousand to three thousand cruise visitors and staff may come ashore in a given port on cruise days. Many of the passengers will take pre-booked excursions and VM attention is directed primarily at those coming

ashore independently. The nature and scale of the response varies from port to port, largely as a function of how close cruise ships can berth to the centre of the city, but commonly includes:

- creating a designated cruise passenger terminal;
- managing visitor flows in working docks;
- capacity building among local operators regarding the level of service required;
- ensuring ready access to the city centre, if necessary by providing shuttle services; and
- providing visitors with adequate information and opportunities to purchase tours and other products, for example through a seasonal, dockside information centre or by a corps of volunteer city ambassadors.

In Wellington, a bottleneck frequently develops at the cable-car, which provides access to a scenic viewpoint at the botanic gardens, a visit that has become a popular activity amongst visitors when they first come ashore. As the cable car has a fixed capacity this has led to long queues at the bottom terminal. The most recent attempt to alleviate this involves a combined spatial/temporal solution, whereby the shuttle service from the cruise ship terminal is limited for the first 2 hours to a stop at the visitor information centre rather than one near the cable-car, so as to encourage other activities and spread the demand more evenly throughout the day.

This coordination of VM measures has generally fallen by default to the regional tourism organization at each port. In Dunedin it is done by the council staff member responsible for destination management. She summed up the strategic importance of dealing with these issues in the following terms:

‘We try to get them [the shuttles] in as close to the centre of the city, so they’re delivering people into the retailers and to the i-SITE [information centre] and the attractions without disturbing the residents, because there’s that whole balance between the residents not getting annoyed with the influx of visitors, and the visitors having a good experience [...] Economic benefit is best served [...] by getting them into the Octagon [centre of Dunedin] if they want those people to be spending one minute after they get out of the bus.’

Large-scale events are another common example where VM intersects critically with other aspects of destination management. Events are actively sought and promoted in many destinations, particularly as a means of generating demand during the off-season or at weekends. The holding of events, especially large ones, generally requires a destination-wide approach; firstly, through an active convention bureau to attract the event in an ever-competitive market; secondly, to ensure sufficient accommodation and venue space is available; and thirdly, to ensure the successful running of the event itself. Visitor management is especially important in this latter regard as the concentrated influx of visitors can cause congestion and other problems such as drunkenness and rowdiness from exuberant sports fans, which diminish the experience for some attendees and impact on other visitors or residents. One response to managing these latter problems is to establish designated fan zones where visitor behaviour is more readily controlled, their security is better managed and impacts on residents are contained.

While the interdependence of the various functions needed at a destination and the coordination or integration of the different bodies involved in undertaking these

may not always be readily achieved, the incorporation of VM into any organizational structures for destination management can be particularly challenging. Much of the work on this fourth dimension relates to DMOs. Where the focus is on destination *marketing* organizations, there is only limited scope to manage visitors, such as selectively targeting particular markets (e.g. overnight tourists rather than excursionists) or providing information on new attractions and promoting visitor trails to spread demand and also enhance the visitor experience. Even when there is some form of destination *management* organization, managing visitors at the scale of the destination is often problematic. The owners or managers of specific sites or attractions will be responsible for their VM and many, such as national park authorities, will have well developed policies and practices for doing so. However, responsibility for VM beyond and between specific sites is often rather blurred and may fall between organizational cracks. Ultimately it is often local government that is left to deal with issues of access to and within destinations and management of public open spaces. The extent to which relevant council departments acknowledge the importance of tourism, recognize visitors alongside residents and are connected to any broader destination management organizations will play a crucial part in determining how well VM is effectively incorporated within destination management. In their study of the major beach resort of Pattaya in Thailand, Longjit and Pearce (2013) found collaboration and coordination amongst multiple government agencies was more readily achieved where there was a more confined or specific management focus, such as the organization of a large music festival or dealing with beach security, rather than managing dispersed nightlife activity.

Much of the work in this field has been normative, proposing what should be done or has been undertaken from a management or planning perspective. The tourists' voice has generally been absent in terms of how destinations are managed (Pearce and Schänzel, 2013). To explore this issue Pearce and Schänzel held a series of focus groups with youth hostel guests at three locations across New Zealand. The participants generally agreed that destinations should to be managed. In terms of particular functions they valued destination marketing and the provision of information, two functions that are directly related to making decisions about what to do and where to go. They also acknowledged the need for VM, for example in terms of ensuring visitor safety. At the same time, these participants stressed the view that destinations should not be over-managed, that any management should be 'discrete' and 'subtle' so that it did not detract from the experience of discovery and self-reliance: 'The most effective ones [destinations] that we've been to have managed it in a way that you kind of don't always realise that it is being managed'; 'I've enjoyed struggling in some places because I feel like I'm not in a tourist destination. I feel like if everything was overly managed everywhere I wouldn't get that feeling sometimes'.

This raises the question of where the boundaries lie between effective destination management and over-management. Some parallels might be drawn with the related issues of carrying capacity and the limits of acceptable change, which have been the focus of much VM work (Glasson *et al.*, 1995). However, in their study Pearce and Schänzel suggested the issue did not equate just to levels of crowding but rather to tourists' perceptions of being managed and the extent of this management. Moreover, they found that views on what constituted a good destination

were highly personal and subjective. Accordingly, 'what may create for one a feeling of frustration arising from a lack of information or poor signage may for another engender a sense of surprise and spontaneity' (Pearce and Schänzel, 2013, p. 143). Striking the right balance clearly presents challenges. At the same time, a related paper by Pearce and Schänzel (2015) showed that tourists may hold a very fluid concept of what constitutes a destination, one which readily encompasses layers of destinations, from the national through the regional to the local, as their journey unfolds. As a result, the issue of administrative boundaries, which often complicates destination management matters from an organizational or administrative perspective, may be much less critical from the demand side than is sometimes assumed. In all of this, a good understanding of visitors, and their motivations and needs is critical, a point that is perhaps better appreciated with respect to VM than in the broader field of destination management.

## 2.4 Conclusion

As the preceding discussion has shown, VM and destination management have much in common but they are generally viewed through different lenses; the former focuses on the visitor while the latter takes a bigger picture of the destination and all the elements within it. Mutual benefits might be obtained by drawing the two perspectives more closely together. A fuller picture of VM issues and solutions might be developed when the current emphasis on site-specific matters is complemented by more attention to inter-site and destination wide matters. For instance, questions of limiting access and initiatives to spread demand, two common VM techniques, might be addressed more effectively if these are set squarely in the context of the destination and VM is recognized more explicitly as one of the functions of destination management. This is needed from both perspectives; destination management also needs to consistently incorporate VM and those responsible for it need to appreciate and draw more extensively on work in that field in order to better deliver quality visitor experiences and manage the diverse impacts visitors create. The emerging theme of co-creation involving visitors and providers delivering memorable experiences might be extended to co-creation of research that merges more effectively the two streams of literature on visitor and destination management.

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# 3

## Meeting the Challenge of Managing Visitor Experiences at Tourism Attractions

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### 3.1 Introduction

Visitor experiences have been called the *raison d'être* (Pizam, 2009, p. 343) or the essence (Tung and Ritchie, 2011a, p. 1367) of the tourism industry; an opportunity to gain experiences is a major reason why people voluntarily leave their homes and travel to other destinations. Visitor attractions are one part of the tourism industry that act as a catalyst or motivator for people to do this. Many researchers have commented on the importance of visitor attractions for tourism destinations (e.g. Wilson *et al.*, 2001; Prideaux, 2002; Swarbrooke and Page, 2002; Sharpley, 2007). All agree that visitor attractions are one of the mainstays of tourist activity and that without them there would be little for most tourists to visit. Swarbrooke (2001, p. 218) is blunt in advocating that 'hotels, restaurants and so on are all important, but they are secondary to the attractions which provide the primary motivation for tourist trips'. Visitor attractions however are a very diverse collection of objects, people and places. Similarly, the people who visit them may do so for a host of reasons and, unlike other sectors of the tourism industry such as transport or accommodation, which are functional elements within the system (Leiper, 1990), attractions rely very heavily on their experience offerings to encourage tourists or locals to visit. The combination of these factors makes managing visitor experiences at attractions challenging.

This chapter explores these challenges. It begins by looking at the definition and classification of visitor attractions, before examining the dimensions of the tourism experience and factors that influence their attainment by visitors. It then identifies and discusses several conceptual frameworks that are relevant to the management of visitor experiences at attractions before concluding with a short case study that highlights how collaboration amongst stakeholders at one attraction – a long distance cycle trail in Southern New Zealand – is helping it to manage visitor experiences.

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### 3.2 Defining and Classifying Visitor Attractions

Given the importance of visitor attractions in the tourism system it is not surprising that early work in the area (Gunn, 1988; Leiper, 1990; Pearce, 1991) attempted to define what they are, although it is worth noting as several authors do (e.g. Swarbrooke and Page, 2002; Hu and Wall, 2004) that no universal definition has eventuated. Definitions of attractions vary, with some taking a more theoretical and systematic view (Gunn, 1988; Leiper, 1990) while others are more applied and focus on the tangible elements that attract visitors. Leiper (1990, p. 371), who took a more theoretical view, defined them as 'a system comprising three elements [...] a tourist or human element, a nucleus or central element and a marker or informative element. A tourist attraction comes into existence when the three elements are connected'. In Leiper's definition, the tourist is not passively 'pulled' towards an attraction but is an active participant in the process and is pushed towards an attraction by their own motivation to satisfy internal needs and wants. In contrast to these more theoretical approaches are definitions that focus on the major resource or feature that attracts visitors. These include those by Pearce (1991, p. 46) who described a visitor attraction as a 'named site with a specific human or natural feature which is the focus of management and attention' and Hu and Wall (2004, p. 619) who defined attractions as a 'permanent resource, either natural or human-made, which is developed and managed for the primary purpose of attracting visitors'.

With the difficulty in defining attractions, it is not surprising that researchers have used a variety of typologies and methods to classify them. This includes differentiating them according to their physical or tangible features (Swarbrooke, 2001) or as Leask (2008) does by their market features (local, regional, national and international), type of ownership (public, private, voluntary and charity), the nature of the resource on which the attraction is based, cost for the visitor and finally resultant products such as catering, interpretation, retailing, events, conferences and activities. Wall (1997) offered a slightly different classification system based on an attraction's spatial characteristics, which he identified as points, lines and areas. Line attractions are geographic linear resources such as 'coastlines, lake shores, rivers, scenic routes, and trails' (Wall, 1997, p. 241), while point attractions are sites such as waterfalls, galleries, historic and archaeological sites, monuments, and temples that require 'large numbers of visitors to concentrate in a small area' (Wall, 1997, p. 242). The third part of Wall's framework involved areas, which include 'parks and protected areas, wilderness, and scenic landscapes' (Wall, 1997, p. 242).

### 3.3 Understanding Visitor Experiences

Like attractions, there is no universal definition or agreement on what tourism experiences actually are and what factors determine their formation (Oh *et al.*, 2007; Volo, 2009; Tung and Ritchie, 2011a). This is perhaps a reflection of the 'complexity of the tourism experience' (Volo, 2009, p. 114) and the subjectivity that characterizes their formation and ongoing impact among visitors. Those who have attempted to define the tourism experience have generally focused on a combination of different elements. These include: experiences as something in contrast to the daily experience

(Quan and Wang, 2004) outside the visitor's usual environment or away from home (Jurowski, 2009); past travel events that become long-term memories (Larsen, 2007; Jefferies and Lepp, 2012); events or activities that engage people in a personal way (Manfredo *et al.*, 1983; Pine and Gilmore, 1999; Schänzel and McIntosh, 2000; Jurowski, 2009) that take place both before, during and after tourist activities (Tung and Ritchie, 2011a); that are unique to each individual (Swarbrooke and Page, 2002; Kastenholz *et al.*, 2012); are internally produced (Oh *et al.*, 2007; Jurowski, 2009; Kim *et al.*, 2011) and involve consumers in a range of ways, including emotionally, physically, intellectually and spiritually (Pine and Gilmore, 1999; Mossberg, 2007; Volo, 2010; Jefferies and Lepp, 2012).

More recently, researchers have shifted their focus to extraordinary (Farber and Hall, 2007; Jefferies and Lepp, 2012) or memorable experiences (Curtin, 2010; Kim, 2010; Kim *et al.*, 2011; Tung and Ritchie, 2011b). Jefferies and Lepp (2012, p. 38) define extraordinary experiences as 'highly memorable, very special, emotionally charged, and potentially life altering in that they may contribute to personal growth or renewal'. The underlying assumption of this work is that visitors' experiences of tourism situations vary greatly and that memorable or extraordinary experiences are most important because they are 'exceptionally vivid and long lasting' (Kim, 2010, p. 781) and therefore are more easily recalled. The practical implications of this are highlighted by Curtin (2010, p. 151) who argues that 'customers' future expectations and behaviours are often based on memories of prior experiences'.

Adding to this complexity are the different dimensions of experiences. Pine and Gilmore (1999) in their seminal text on the 'experience economy' identified four major realms of staged experiences: aesthetics, entertainment, education and escapism. A visitor's level of immersion or absorption in the experience and their type of participation (active or passive) are key factors that determine the experience obtained. Others have looked more specifically at tourism experiences. For example, Volo (2009) believed that tourism experiences can be characterized by four major dimensions: accessibility, affective transformation, convenience and value. Aho (2001) on the other hand believed that for a core experience to have taken place a visitor needs to be affected in a significant way. He identified four major ways this might occur: by becoming emotionally affected, informed, practiced or transformed. Quan and Wang (2004, p. 300) took a slightly different view by suggesting that 'the tourist experience consists of two dimensions, namely, the dimension of the peak touristic experience and the dimension of the supporting consumer experience'. The peak tourist experience is related to the attraction(s) that form the major motivation for tourists to visit a particular destination. The supporting consumer experience refers to the other elements, such as accommodation, transport and food, that are part of the broader visitor journey.

The factors that influence or shape the attainment of positive visitor experiences have been the focus of research in a range of disciplines such as tourism, hospitality and recreation. A summary of this work suggests that a diversity of factors, some related to the individual consumer and others related to the setting where the bulk of the experience takes place, are influential in determining a visitor's experience. In terms of the individual consumer it is worth noting the growing view that consumers bring with them their own particular expectations, behaviours and attitudes and are not just passive recipients of experiences but are actively involved as co-producers

(Jager and Sanche, 2010; Calver and Page, 2013; Lu *et al.*, 2015). The inherently personal nature of experiences means that 'no two people can have the same experience, because each experience derives from the interaction between the staged event [...] and the individual's state of mind' (Pine and Gilmore, 1998, p. 99). One of the key factors that individuals control, which research suggests has an impact on their experience, is their level of involvement (Mossberg, 2007; Kim, 2010; Lu *et al.*, 2015). Research by Oh *et al.* (2007) led them to conclude that active involvement by individuals affects their experience, while Kim (2010) believed it helps to increase retention of travel experiences. Curtin (2010) identified engagement and outstandingness as two other features of visitor experiences that help in memory recall. Similarly, an individual's expectation prior to their visit has also been considered as a factor that can positively or negatively determine an individual's perception of their experiences (Schänzel and McIntosh, 2000; McCool, 2006).

The other obvious determinant of an individual's experience is the setting and the events or activities where this experience takes place. Settings include the biophysical, managerial and social attributes of a real place (McCool, 2006) and are incredibly diverse and dynamic. For example, the social setting of many attractions can depend on the number of visitors (Swarbrooke, 2002a), travelling companions (Dorwart *et al.*, 2009), local residents (Blackwell, 2002) and service providers (Roberts *et al.*, 2001). This is particularly the case with tourism operators in rural locations where 'it is small, single enterprise businesses that deliver the bulk of the visitor experience that define a visitor's experience of a destination' (Roberts *et al.*, 2001).

Attributes of the physical landscape are often a key feature of the settings for many outdoor recreation attractions. In some cases the visitor's reaction to and interaction with the physical attributes of these landscapes is one of the defining factors that shape their experience. Research by Manfredo *et al.* (1983), Schänzel and McIntosh (2000), McCool (2006), Farber and Hall (2007), Mossberg (2007), Williams (2007) and Dorwart *et al.* (2009) all note how elements related to natural landscapes such as scenic values, wildlife and management actions can shape a visitor's interpretation of their experience. This is similarly the case with heritage-based attractions. Much research (e.g. Tasci and Knutson, 2004; Hughes *et al.*, 2008; McShea, 2010; Calver and Page, 2013; Lu *et al.*, 2015) has been devoted to the concept of authenticity and the challenge for some heritage-based attractions to balance the entertainment value of their offerings to visitors with the conservation and authenticity issues that this potentially creates.

### 3.4 Conceptual Frameworks and the Visitor Experience Journey

Given the previously stated views of Pizam (2009) and Tung and Ritchie (2011a) on the importance of visitor experiences and the pivotal role of attractions (Swarbrooke, 2002b; Sharpley, 2007) it is surprising that more frameworks and models have not emerged that directly address the relationship between the two. Both Leask (2010) and Ritchie *et al.* (2011) note that more work needs to be devoted to the 'development of models and theoretical knowledge' (Leask, 2010, p. 163) in these areas.

Nevertheless, while conceptual frameworks are limited, particularly in relation to the management of visitor experiences for attractions, there are some that have

been developed in a range of disciplines including tourism that may be relevant. These frameworks generally fall into two groups. In the first group are frameworks (see Aho, 2001; Lane, 2007; Jager and Sanche, 2010) that provide a conceptual interpretation of the different stages involved in the total visitor experience journey from home and back. Frameworks in the second group concentrate more specifically on visitor experiences and their outcomes actually on-site at the attraction. These include studies undertaken by Laws (1998) and Albrecht (2014), which used service blueprinting to assess key service touch points and management actions for specific visitor groups at particular visitor attraction sites. As such, their focus tends to be on service offerings 'in setting' or at the attraction and not on the pre or post experience. Another framework within this group comes from the recreation management field and is known as the 'recreation demand hierarchy' (Manfredo *et al.*, 1983). This framework identifies four levels of recreation demands by visitors of particular locations. At the top of this hierarchy are demands related to activities, followed by settings, experiences and, finally, benefits. Put simply, the framework surmises, 'that people engage in certain recreation activities in particular settings in order to have satisfactory experiences' (McCool, 2006, p. 4). The combination of these three demands provides the physical, social or psychological outcomes that visitors seek through participation. Both Schänzel and McIntosh (2000) and Beeho and Prentice (1997) used a management analysis tool, ASEB (activities, settings, experiences, benefits) derived from the recreation demand hierarchy to understand the experiences that visitors gain at both heritage and nature based attractions. Again the focus of this framework is very much on the setting.

The frameworks that fall within the first group all provide a holistic analysis of the visitor experience journey (see [Table 3.1](#)) and offer a more expansive view of the pre, during and post stages normally associated with travel. While the number of stages in each of the frameworks may differ, they all tend to cover the same types of stages. For example: planning; researching; booking; travelling to the destination; experiencing or visiting; departing; going home; sharing; evaluating and remembering.

The strength of these frameworks is they can be applied either by individual attractions to appraise a visitor's experience of just that tourism offering or more broadly by destination management organizations who are concerned with the collective experiences of visitors. What the frameworks clearly articulate is that the challenge of managing for visitor experiences at attractions goes beyond just what happens 'at' the attraction and needs to consider the other stages of the visitor journey. This does not discount the importance of what happens at the attraction setting. It is the stage most likely to provide the grounds for a positive peak, extraordinary or memorable experience for visitors, given that is often what has motivated them to travel to the destination. Frameworks from the second group, such as the recreation demand hierarchy, offer clarity as to how experiences are formed in these visiting or attraction experience stages and how this can lead to positive outcomes for all involved, not just visitors. What is notable about the different groups of frameworks is that they are complementary. The broader holistic view highlighted by frameworks in group one offers an insight into the total visitor experience journey from home and back, while frameworks such as the recreation demand hierarchy in group two focus on perhaps the most important stage of the visitor journey – the generation and outcome of experiences 'in setting' at the attraction. Together they help to



**Table 3.1.** Stages of the visitor experience journey.

	<b>A process model of tourism experiences (Aho, 2001)</b>	<b>Park Canada’s visitor experience cycle (Jager and Sanche, 2010)</b>	<b>The visitor journey (Lane, 2007)</b>	<b>Management stages and the visitor experience journey (adapted from Lane, 2007)</b>
<b>Stages of the visitor experience journey</b>	Orientation	Wishing	Stimulation, planning and anticipation	Managing how visitors discover, plan and book
	Attachment	Planning		
				Ease of booking
	Visiting	Travelling Arriving	Travel to the destination	Managing how visitors access the attraction
		Visiting	The destination experience	Managing visitors’ attraction experience
	Evaluation	Departing	Going home	Managing how visitors get home from the attraction
	Storing			Managing visitors’ reflection and memory of their experience
	Reflection	Remembering	Recollection of the experience	
	Enrichment			

explain how particular attractions are meeting the challenge of managing the experiences that visitors have of their product at all stages of their journeys.

### 3.5 Managing the Visitor Experience Journey: The Case of the Otago Central Rail Trail

An example of a visitor attraction that appears to be successfully managing visitor experiences is the Otago Central Rail Trail (OCRT). This 150 km trail built upon a discontinued rail line is an example of what Wall (1997) describes as a line attraction. Its success in attracting large numbers of bicycle tourists (over 12,000 annually) has spurred the growth of many small enterprises and is credited with revitalizing many tiny towns in this relatively remote part of southern New Zealand. Surveys conducted by the Central Otago District Council reveal that users rate their visitor experience very highly and feel the trail has met or exceeded their expectations (Central Otago District Council, 2011).

One of the factors that has contributed to the success of this cycle tourism attraction is the collaboration that exists between the major stakeholders involved. These major stakeholder groups include the Department of Conservation (DOC) who manage the trail as a recreation reserve and spend over NZ\$300,000 a year maintaining it; the OCRT Trust, a non-profit group that has raised over two million dollars for trail enhancement projects since 1994; the Rail Trail Operators’ Group, which represents operators on the trail; Tourism Central Otago, which actively promotes



the trail both to New Zealand and overseas visitors; Central Otago District Council, which administers the biennial survey of visitors on the trail; and finally Enterprise Dunedin, the Regional Tourism Organisation that promotes the city of Dunedin, some of which covers the lower section of the trail (Central Otago District Council, 2012). Collectively these groups are known as the OCRT Stakeholder Governance group and meet when major issues arise that concern the trail. The DOC, as the official manager of the trail, chairs these meetings.

### **3.5.1 Managing how visitors discover, plan and book**

A major initiative of the stakeholder governance body has been the formation of the OCRT Marketing group. This group has been responsible for creating a unified marketing strategy and the development of an official point of contact for all visitors, the OCRT website. The website is administered by the OCRT Trust and is funded by monies raised by the Trust and Rail Trail operators who have come together to create a comprehensive, consistent and engaging information portal for prospective visitors. Operators pay a range of fees to be promoted as bronze, silver or gold brand partners.

The development of this official rail trail website has allowed the trail and its diverse range of stakeholders to meet the challenge of managing the early stages of the visitor experience journey such as wishing/attachment and stimulation/planning (Table 3.1). Bookings for the trail are still made through individual operator websites. The consistent theming that distinguishes the official OCRT website and its extensive imagery and design ensures that visitors' first contact with the trail is comprehensive, welcoming and engaging. This has been important in establishing pre-trip intentions for visitors, which according to Tung and Ritchie (2011a) could result in tourism experiences that meet or exceed visitor expectations. Collaborative marketing activities between Tourism Central Otago, some large operators such as Trail Journeys and Tourism New Zealand have also been instrumental in promoting the trail to prospective visitors in the North Island of New Zealand and internationally in countries such as Australia.

### **3.5.2 Managing how visitors access the attraction**

In regards to access, Dowsett (2008, p. 68) recognizes that one of the key success factors for the development of the OCRT has been 'the broader, regional development of efficient and regular connection services to Queenstown in the west and Dunedin in the east'. These connection services have been provided by entrepreneurial tour operators rather than public transport bodies. Perhaps the only issue that exists regarding access to the OCRT is related to the limited service offered by the Taieri Gorge Railway, the daily tourist train that operates between Dunedin and Middlemarch, a starting or finishing point of the trail. At present the train runs all the way through to Middlemarch (a distance of 154 km by rail) on Fridays and Sundays. During the other days of the week however, the train only goes as far as Pukerangi (a remote and tiny outpost), which means OCRT visitors have to organize private connections to reach the start of the trail or ride the remaining 21 km to reach Middlemarch.

### **3.5.3 Managing the visitor experience at the attraction**

Of course, while these early stages are increasingly important to the visitor experience journey, they are still secondary to the main reason why many people travel; that is to experience particular attractions. The use of the recreation demand hierarchy framework can help to clarify the impact of management actions on the activities that visitors undertake (mainly cycling) on the OCRT and the settings where these activities take place (the trail and the broader destination).

Three management processes are important. The first involves the loose partnership that exists between the DOC and the OCRT Trust. Formed in 1994 at the start of the trail project, this partnership has seen the Trust raise significant private funds for the enhancement of the trail setting (resurfacing the trail and installation of non-personal interpretative media-information panels, ganger sheds and passbooks) and provide a vehicle for community engagement. DOC annually fund the ongoing maintenance of the trail.

The second management process is the role of the OCRT Stakeholder Governance group. It has provided a broad management forum to deal with issues that have a direct impact on the visitor experience as they arise. For example, one of these issues has been the contentious use of electric powered bikes on the trail. Having a forum that provided a voice for all key stakeholders, particularly tour operators who deal directly with visitors, allowed the issue to be resolved to the satisfaction of all major parties.

The third management process that directly affects the visitor experience at the OCRT is more informal and involves the role of tour operators. These private enterprises are comprehensively involved in: co-creating the experience with visitors and managing the booking of accommodation and secondary attractions; movement of visitors' bags between accommodation; transport arrangements to and from the trail and the provision of very high quality bikes. Some even provide guiding services for visitors along the trail.

### **3.5.4 Managing a visitor's reflection and memory of their experience**

The growing use of social media by visitors has made this an increasingly important stage for all organizations concerned with the management of visitor attractions. The development of the official OCRT website and its direct links to social media giants Facebook, YouTube, Twitter, Pinterest and TripAdvisor has helped the trail meet the later stages of the visitor experience frameworks such as storing, recollection and enrichment. The large number of reviews of the trail on TripAdvisor reflects visitors' eagerness to share and reflect on their experiences. A quarterly digital Trail Newsletter is also produced by the OCRT Trust, providing opportunities for visitors to keep in touch and help relive memories of their experiences. Again, the role of the OCRT Marketing group, the OCRT Trust and tour operators, some of whom have a significant social media presence, are pivotal in ensuring that opportunities exist for visitors to remember and reflect on their rail trail experiences.

### 3.6 Conclusion

Meeting the challenge of managing visitor experiences is no easy task for those bodies responsible for visitor attractions. This is due to the fact that experiences are inherently personal and a range of factors can influence a visitor's perception of them. Some of these are directly related to the individual while others are determined by the biophysical and social settings where the experience takes place. Adding to this complexity is the growing awareness amongst researchers and service providers that a visitor's experience goes beyond just what happens in a setting and that advances in technology and social media have made the pre and post stages particularly important. Fortunately, several conceptual frameworks have emerged that offer both a holistic view of the whole visitor experience journey and a more specific view of the development of experiences and their outcomes at particular attraction sites.

The application of these frameworks in the OCRT case study demonstrates that managing for visitor experiences is complex, as attractions do not exist in a destination vacuum and are part of a broader tourism system (Leiper, 1990). This is particularly the case for line attractions such as the OCRT, which traverse large geographical distances and rely on a host of public bodies, non-profit groups and large numbers of small- to medium-sized private enterprises to manage or contribute to the experiences of visitors. Given the diversity of these stakeholders, the case study demonstrates that a range of formal and informal management structures are required to ensure that visitors are obtaining the best possible experience at all stages of their journey. Not surprisingly, various collaborative models have evolved that take advantage of individual stakeholder's core missions and strengths and provide an avenue for all interested groups to resolve any major differences and contribute to these management processes.

These collaborations highlight that managing and catering for the various stages of the visitor experience at some attractions has gone beyond the mission or expertise of one body and that a flexible and broad coalition of stakeholders is required to provide the environment that allows visitors to co-create their own memorable or extraordinary experiences.

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# 4

## The Social and Political Dimensions of Visitor Management: Rural Home-based Accommodations

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### 4.1 Introduction

This chapter explores visitor management (VM) practices employed by home-based accommodation providers in rural Iran. It demonstrates how the social and political conditions of a host country influence the choice of VM strategies.

Home-based accommodations in Iran are informal, locally owned, culturally authentic homes for tourists. Associated with them is a unique way of providing services and running the business, reflecting the simple and modest rural image that many visitors seek. Scattered throughout the country, these accommodations have distinctive characteristics; they are not overtly profit driven, involve the active participation of family members in running the business, and offer an informal and casual environment with a high level of interaction between guests and hosts and, to some extent, their families. The hosts have incorporated elements of their local culture in hosting guests, including the use of local architecture, cuisine and music. They live close to nature in villages and the countryside away from the administrative centres, and are thus able to preserve their culture, traditions and lifestyle (Khoshesar, 2014).

While the term ‘guest’ would be more appropriate to the unique dimensions of hospitality in the home-based accommodations (Di Domenico and Lynch, 2007), in the current chapter and in relation to the applied literature, the term ‘visitor’ is used interchangeably, with the peculiar meaning and value inherent in the concept of guest still being relevant.

Qualitative data, acquired through semi-structured interviews with 19 hosts, as well as through the researcher’s observations while staying at the accommodations and her informal discussions with guests, are presented throughout the chapter.

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The chapter introduces the home-based accommodations in Iran by discussing different categories of commercial homes. Two groups of guests staying at these accommodations and their motives are presented, and the challenges faced by the hosts in managing guests are addressed in light of possible hard and soft approaches to VM. This chapter thus contributes to the literature on VM by highlighting the influence of social and political environments in VM.

## 4.2 Home-based Accommodations in Iran

The home-based accommodations in this study are categorized as commercial homes. Proposed as an alternative to both the hotel and the private home, and a bridge between pure forms of each (Lynch *et al.*, 2007, 2009), commercial home enterprises refer to 'types of accommodation where visitors or guests pay to stay in private homes, where interaction takes place with a host and/or family usually living upon the premises and with whom public space is, to a degree, shared' (Lynch, 2005, p. 534). They cover a range of accommodation types including farm stay accommodation, host families, some small hotels and B&Bs (Tucker and Lynch, 2004; Lynch, 2005; Harris, *et al.*, 2007; Sweeney and Lynch, 2007; Lynch *et al.*, 2009). While income generation is often not seen as a main priority for commercial home operators (Lynch *et al.*, 2009), the term 'commercial' does indicate the dominance of business transaction and profit-making. Because profit-making was not considered as a main driver for hosts in this study, the term 'home-based accommodations' is used instead of 'commercial homes'.

According to Moscardo's (2009) categorization based on the importance of the accommodation to the overall visitor experience, the home-based accommodations in this study are considered as the destination, and the principal focus of the guests' experience. Based on a different categorization that uses the degree of host-guest separation (Lynch and MacWhannell, 2000; Lynch *et al.*, 2009), the majority of the accommodations in this study fall into the first and second categories, where the accommodation unit is a family home and owners live on the premises, but there are differences in the extent of public space shared with the guests. According to another categorization by Lynch *et al.* (2009), the accommodations in this study are considered traditional commercial homes and cultural homestays.

## 4.3 Visitor Management in Home-based Accommodations

Visitor management, defined as 'an ongoing process to reconcile the potentially competing needs of the visitor, the place and the host community' (Kuo, 2002, p. 88), is considered an important way of managing and reducing the negative socio-cultural, environmental and economic impacts of tourism (Mason, 2005). The two main categories within VM are hard and soft approaches. Regulatory management strategies, which include controlling visitor numbers and modifying the resource to cope with visitor volumes, are regarded as hard approaches while soft approaches involve the use of marketing, education and interpretation (Kuo, 2002; Mason, 2005). Due to their limiting character, hard VM strategies alone are not considered effective in



the long term. It is, however, argued that applying soft VM strategies through increasing visitors' knowledge and experience of the place leads into more long-lasting effects (Kuo, 2002). In addition, Mason (2005) criticizes the conventional approach of controlling and minimizing negative impacts as it assumes visitors are guilty unless proven otherwise. Rather, he highlights the importance of education and interpretation as a more holistic approach to VM, leading to not only better informed and thus better behaved visitors but also fewer negative impacts. Blackstock *et al.* (2008) also emphasize that influencing people's values and attitudes rather than providing them with incentives or prohibitions will lead to more long-term change of behaviour.

Before discussing the VM strategies employed by the hosts in this study, an initial understanding of guests and their motives is required. Those staying at these accommodations can be categorized into two groups: the first are either international or domestic guests who travel with the main motivation of experiencing traditional authentic cultures and simple rural lifestyles. Such guests are identified by the hosts as 'special' and 'unique':

[Many] guests who come here are unique, different from mainstream tourists [...] They are genuine cultural tourists who are thrilled and delighted to be here. They travel to learn about a new place and its culture, traditions and customs and geographical nature. They enjoy their stay and I enjoy having them here [...] They are inspiring for the locals who are delighted to see that visitors take interest in their local culture and lifestyle. [This] benefits them by strengthening their self-esteem and confidence [...]

These 'unique' guests, whom the hosts refer to, fall into the definition of 'mindful' visitors who will more likely 'enjoy their visit, express satisfaction with their visit, learn more from their visit and be interested in discovering more about a topic or place. [They are] more aware of the consequences of their behavior and more appreciative of the heritage site' (Moscardo, 1996, p. 382). Mindful visitors are reported to be valuable to tourism management for a number of reasons. Firstly, they pay more attention to management and safety requests on the site leading to less damaging behaviours to themselves, others and the setting. Secondly, mindfulness is a condition of creating insightfulness, which is the personal meaning and appreciation that visitors gain from their experiences. Finally, there is a connection between mindfulness and satisfaction, with mindful visitors more likely to be satisfied with their experiences and thus recommending them to others (Moscardo, 2008).

Based on Cohen's (1979) categorization, these 'unique' guests would be seeking the last three modes of tourist experiences, where the authenticity and meaning of the experience, rather than merely pleasure and entertainment, is considered important. They would also be identified as 'responsible tourists' who respect the environmental, cultural and social aspects, interact and engage with the landscape and the people, and make an economic contribution to the local economy (Stanford, 2008).

To discuss the second category of guests staying at these accommodations, the difference between the host-guest relationship in commercial and private settings should first be highlighted. Using Lashley's (2000) conceptualization of hospitality as three domains of social, private and commercial, it is argued that in commercial hospitality settings, host-guest relationships are typically transactional and non-reciprocal, with a reduced sense of mutual obligation and loyalty. Indeed, freedom of action,

which individuals would not consider demanding in a domestic setting, is regarded as an advantage of commercial hospitality settings (Lashley, 2000). In contrast, the host-guest relationship in private hospitality settings is governed by a set of social rules and reciprocity, where guests are obliged to conform to the hosts' rules and ways (Tucker, 2005; Stanford, 2008; Benmore, 2009).

This specific attribute poses a paradox in the context of Iran where citizens are restricted by tight social rules regarding conduct and dress codes. Those guests who do not want to comply with such restrictions or expectations in public spheres choose to stay at these accommodations. For them, the centrality of home as a private and informal space makes these accommodations more appealing compared to other types with conservative public environments, like hotels. Moreover, the rural setting in which these accommodations are located signifies less strict adherence to rules and regulations. As one host noted: 'Due to the oppressive and restricting conditions, [especially] younger guests feel more freedom in these homes'.

However, once there, these guests are required to relinquish control over their behaviour and actions due to expected notions of reciprocity and mutual obligation. This expectation of giving something back in return for what they have gained was emphasized by one of the hosts: 'If I am taking care of my guests and providing them with good service, I would expect them in return, to indulge in appropriate and respectful behaviour while staying here. They shouldn't want to cause me or the locals any problem or trouble.' Thus, the very attribute that attracts such guests to these accommodations in the first place – the 'home' and attributes associated with it – also presents them with limitation, and the freedom they were aiming at is, to some extent, undermined (N. Hassanli *et al.*, 2015, unpublished results).

The degree to which the hosts felt pressured and threatened by the country's restricting social and political conditions affected how they managed their guests. While some wanted their guests 'to feel at home and have a good time', others were concerned about issues of legitimacy and 'tougher and stricter control and regulations being placed'. Those hosts who felt uncomfortable constantly reminding guests of acceptable behaviour, favoured obtaining a legal permit or licence as a way of limiting guests:

'We do like to have guests but at the same time want to maintain our reputation and dignity. So we're in favour of some sort of restriction and pressure imposed on the guests so they would not take advantage of the freedom they have in these homes. Likewise, among the guests there are some who might not like other guests behaving in certain ways and would prefer a sort of restricting regulation.'

Many hosts were under pressure from the officials because, as hosts, the onus of responsibility was placed upon them to ensure visitors not only behaved appropriately while at the accommodation, but also further afield; in the village and nearby regions. Tucker (2005) highlights the importance of guests abiding by the hosts' parameters not only within the hosts' home, but also beyond the home and in the surrounding areas. According to one host:

'I was once given summon[s] to appear at court because a few of my female guests had violated the norms related to Hijab while in the village and outside my house. I do my bit and inform them of the norms and values, so whatever they do outside my house should not be my responsibility. I felt really offended to be called to court for something which was not my fault or even responsibility.'

The fusion of public and private spheres at these accommodations, as well as the importance of not being viewed as illegitimate, obligated the hosts to balance the home and hosting. While they endeavoured to remain hospitable to their guests, they also tried to communicate the desired expectations and standards to them. In order to avoid similar problems in the future, the same host had decided to put up a sign on the wall reading: 'Thank you for respecting Hijab inside and outside this accommodation'. Another host had a sign reading: 'Dress codes inside and outside of this accommodation unit follow that of other public places in the country'.

As instances of visitor codes of conduct, these signs enable a combination of education and regulation, and promote more responsible behaviour among guests by increasing awareness and understanding of the expectations. It could be argued that the use of deontological statements in these signs, where behaviour is based on expected rules and duties without providing reasons or justification for compliance (Mason and Mowforth, 1996; Cole, 2007a), might not be very effective. Seen as a soft VM approach, it is argued that codes of conduct must appear less patronizing and admonitory and more informative (Mason and Mowforth, 1996; Cole, 2007a). In the former example and to be more effective, the host had consciously avoided the use of 'mandatory language'.

The conflict between the needs and desires of guests and the expectations of hosts was less evident with international guests. This contradicts Cole's (2007b) argument that visiting villages in less developed countries to experience the exotic other may cause miscommunication and misunderstanding due to encounters between two different value systems, attitudes and behaviours. As noted by one host:

'When foreign visitors come here they do so with prior research, reading and awareness, therefore, they have a greater understanding for the local cultural and social issues. The locals are not shocked to see foreign guests not having full covering or not behaving according to norms and values. But this is not the case for [domestic] visitors. They are living in this country and are expected to respect some basic values. The foreign guests respect these matters more; therefore there are less problems and issues with them.'

To confront the discrepancy between how domestic and international guests responded to the hosts' expectations and to avoid relevant challenges, one host had decided to only offer accommodation to international visitors. This approach allowed him to engage with guests who were considerate and respectful of his expectations. Stanford (2008) considers matching the right sort of visitor to the context as a key step towards responsible tourism. Moreover, Mason (2005) confirms that niche marketing – attracting a particular type of visitor – can be used as an approach to modify visitor behaviour. He also warns against mixing groups with different needs and with varied values in order to maximize the positive experience for visitors. According to another host:

'I'm very careful in choosing who can stay here. If I have a group of guests with specific beliefs and values, I won't admit another group who I think do not share the same values, even though I might have room for them. Because I know there would be conflicts and disagreements between them. You might think turning away people at my door is not nice, but I have to do it.'

The above host was concerned that his decision in 'selecting' certain guests contradicted the expectation on him as a hospitable host. Similarly, Benmore (2009) notes

that assessing the suitability of potential guests on the phone or at the door and refusing them in order to protect the home and the business, poses a dilemma as it jars with traditional notions of hospitality.

Interpretation, as another soft approach to VM, has both an educational and entertainment role and 'builds a bridge between education and leisure activities' (Lück, 2007, p. 335). According to Steward *et al.* (1998), interpretation accelerates the process of visitors developing a rich and meaningful appreciation for the place they are visiting and its heritage, culture and landscape. Therefore, interpretation is regarded as a win-win situation for both the resource and visitors (Orams, 1996). In addition, Knudson *et al.* (2003) identify helping visitors to gain a sense of place as a main aim of interpreting. Tilden (2007) recognizes demonstration and participation as two major concepts within the field of interpretation, which provide opportunities for visitors to interact with the resources, and thus encourage them to interpret for themselves. The hosts in this study made use of demonstration by offering guests opportunities to watch local wedding ceremonies or the process of weaving rugs or making traditional bread. They also made use of the concept of participation by playing traditional music instruments and asking guests to sing along or allowing them to play the instruments themselves.

#### 4.4 Social and Political Dimensions of Visitor Management

While many factors such as the nature of the place and visitors' motivation might be important in adopting certain VM strategies over others, it is demonstrated here how the social and political environment of the place could have a determining role.

In today's theocratic Iran, where the state and religion are inseparable, Islam is the foundation of public and private life with the society ordered to conform to the principles of Islamic law. The country's brand of contemporary Islam affects its social, political, cultural and economic environments, and the everyday lives of citizens. In such circumstances, religion influences different aspects of the tourism industry including its policymaking, marketing, operation, and economic viability, as well as the individual host and guest experience (O'Gorman *et al.*, 2007; Zamani-Farahani and Henderson, 2010). Unmarried couples cannot share hotel rooms and proof of their marital status or Islamic sanctioned relationship needs to be provided at check-in. Males and females are often segregated in public places. Public displays of affection and any physical contact between members of the opposite sex are prohibited. Gambling, selling and drinking liquor, discotheques and bars are regarded unlawful. Tourists of other faiths are required to be respectful of local norms and abide by rules, including wearing Hijab for women of all faiths in public areas (Zamani-Farahani, 2010). Finding the social restrictions placed upon them oppressive, the Iranian population live a split lifestyle, acting one way in public and another way in private.

Pressured by the repressive conditions and finding themselves subjected to strong restrictions in the society, many guests chose to stay at these accommodations with the objective of fleeing from tight regulations and seeking a homely experience and the privacy, freedom, comfort and casualness it incorporates. In her study on managing expectations of hosts and guests in small hotels in the UK, Benmore (2009) confirms that the home construct and guests' perception of home affects their behaviour in such establishments.

Although the nature and characteristics of these accommodations allow a more relaxed and loose environment, such guests were found to still be inconsiderate of the expected norms of behaviour. Depending on the degree of the hosts' concern about the legitimacy of their 'business' and dignity of their 'home', as well as the comfort and satisfaction of other guests, a variety of VM strategies, as listed in Table 4.1, were employed.

One strategy discussed by the hosts was gaining a permit or licence for the accommodation unit. Those hosts who did not feel comfortable with having to constantly remind their guests about the expectations or were concerned that doing this conflicted with their role as a hospitable host, were in favour of gaining a permit or licence as a way of imposing limits on guests. However, due to political reasons and the authority of the country's tourism organization resting directly with the Vice-President (Cultural Heritage Handicrafts and Tourism Organization, 2013), conforming to legal requirements set by this organization increases government interference, makes the accommodations too official and formal (which is against their nature), and limits the hosts in adopting their local ways of operating. All these would eventually lead to the accommodations losing their main attraction for many guests. In addition, while such imposed control could potentially achieve immediate benefits by preventing inappropriate behaviour in the short term, it would not ensure long-term effects by enhancing the guests' understanding and appreciation. For all of these reasons, gaining a permit or licence was not seen as a primary approach in managing misbehaved visitors.

Different marketing strategies such as targeting only specific types of guests, refusing certain guests and not mixing different groups with one another were found effective by many hosts. Yet they were conscious of the conflict that adopting these strategies caused between their role as a host and their desire to maintain the dignity and reputation of their accommodations.

While the importance of being proactive in attracting 'unique' and mindful guests was highlighted, the hosts also emphasized the need for educating and informing those who did not fall within this category. One host who had expressed his tendency for having 'unique guests [...] [who] travel to learn about a new place [...] [and] act very professionally' continued to say: 'This does not mean that others should be discouraged from becoming professional cultural tourists, but they must be notified and made aware of the relevant issues'. According to another host:

'When a newcomer enters a region, they should abide by the rules of the region. I'm positive that this would eventually happen and the "culture" of respecting the

**Table 4.1.** Hard and soft visitor management approaches adopted by the hosts.

Hard approaches	Soft approaches
Obtaining a legal permit or licence	Verbally communicating expectations to guests
Imposing time restrictions on noise level	Posting signs (e.g. visitor codes)
	Matching the right guests to the context/ attracting certain groups of visitors
	Not mixing groups with varied needs and values
	Using interpretation, demonstration and participation

hosts' values will be built. We [the hosts] are the ones responsible for building this culture and educating the visitors.'

Using visitor codes of conduct, providing verbal explanation about the expectations, both before and during their stay, as well as interpretation practices, were found to be useful by the hosts in increasing awareness among guests.

The literature confirms that interpretation, which has both an educational and entertainment role (Lück, 2007), aims to produce more mindful visitors (Moscardo, 1996; Tubb, 2003; Mason, 2005). In inducing mindfulness both intrapersonal and situational factors, or visitor and setting characteristics are influential (Frauman and Norman, 2003, 2004; Moscardo, 2008; Winkle and Backman, 2009). The individual's interest in the place or experience and motivation to learn and/or have memorable experiences are among the effective visitor factors (Moscardo, 2008). The hosts in this study affected visitor factors through the use of marketing strategies and selecting those unique, special, mindful and responsible guests discussed previously. Nevertheless, it could be argued that setting factors are under more direct control of the hosts as service providers. According to Frauman and Norman (2004, p. 381), a setting that is (i) 'varied, interactive, and involving'; (ii) 'facilitates perceptions of control'; (iii) 'appears relevant to one's interests'; and (iv) 'perceived as new, different, or unique' can induce mindfulness. Additionally, elements such as authenticity, rarity, diversity, cultural significance and distinction of the place could contribute to mindfulness (Moscardo, 2008).

Therefore, by providing services, activities and interpretation programmes that are mindfully oriented in their delivery, the hosts foster awareness, appreciation and attentiveness among guests and influence their responsible behaviour. Thus, they benefit not only from a guest 'with preferences and motives that lend themselves to mindfully oriented activities and services' but also a guest that is 'influenced or induced on site to become more mindful' (Frauman and Norman, 2004, p. 387). Such visitors would then feel more control over their behaviour, thus making it easier to manage their impacts (Tubb, 2003; Winkle and Backman, 2009).

## 4.5 Conclusion

Through exploring the challenges that the home-based accommodations' hosts face in managing their guests, this chapter demonstrates how the social and political conditions of the country affect the use of VM strategies.

The tight social conditions and the restrictions imposed on the Iranian population, especially the youth, was the main reason behind one group of guests' motivation to travel to and stay at these accommodations. For such guests, the freedom and casualness associated with the home concept, and the desire to escape from complying with certain codes of behaviour and dress while travelling was regarded as a main motivation.

As the hosts' main concern was in relation to managing such 'misbehaved' guests, strategies such as obtaining a legal permit or licence were considered as a way of imposing formal restrictions on them. However, possessing both legitimacy and power authorized the government to excessively limit registered accommodations to conform to certain ways of offering services to their guests, thus restricting the use of



this strategy in managing guests. Therefore, as evidenced, the country's social and political conditions not only affect the type of guests staying at these accommodations, but also the strategies used to manage them. The degree to which the hosts feel pressured and threatened by such restricting conditions also affects their choice of VM strategies.

While hard approaches were used for managing those guests inconsiderate of the expectations, the importance of being proactive in using soft VM approaches of marketing, education and interpretation in order to increase awareness and understanding among all guests was highlighted. Arguably, this does not only influence visitors who are predisposed to be mindful, but also induce mindfulness in other visitors less mindful of the setting (Frauman and Norman, 2004).

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## **Part II   Critical Concepts in Visitor Management**

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# 5

## Indicators and Standards-based Visitor Management Frameworks in Achieving Sustainability at Cultural Heritage Sites

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### 5.1 Introduction

While heritage tourism makes an important economic contribution towards the preservation and management of heritage resources, it has also become one of the main justifications of maintaining heritage sites (McArthur, 1994). Recognized as a distinct product category in the late 1970s, heritage tourism now represents both opportunities and threats to the sustainability of heritage resources. It is rarely possible for tourists to experience heritage resources without causing them some damage (McArthur, 1994; McArthur and Hall, 1996). Wall (1989, p. 10) believes that the mere presence of tourists at heritage sites 'is likely to result in the modification of those environments'. Making the resources less attractive and reducing their value may in turn lead to decline in tourist satisfaction and the benefits that others can gain from the heritage.

Consequently, there is a challenging relationship between heritage resources and tourism; how can these irreplaceable resources be visited and experienced by tourists while at the same time protecting them for future generations? Implicit in this argument is the concept of sustainable heritage tourism that aims to maximize the quality of tourists' experience and minimize their impacts to protect the resources for the next generations, and this is what visitor management (VM) intends to achieve. Therefore, VM might be considered as a tool to achieve the goals of sustainability in heritage tourism.

While tourists' impact cannot be ignored, the need for heritage tourism to seriously consider both the resource (supply side) and visitor experience (demand side)

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has been argued by some scholars (McArthur and Hall, 1993). Traditionally, management of heritage tourism was product-led (Edwards and Liurdes, 1996) and heritage resources were considered as the central element of the process (Hall and McArthur, 1993, 1996; Timothy and Boyd, 2003). Recently, attention has been paid to the importance of the tourist in achieving the goal of sustainability in heritage tourism (Willson and McIntosh, 2007). When tourists have a satisfying experience, they support the philosophy of the site's management (Hall and McArthur, 1993; Hall and McArthur, 1996), so the site becomes easier to manage. Both highly satisfied tourists and involved stakeholders (including tourists themselves) are a key to the long-term public support for the protection of heritage areas in general and the funding of these sites as a social priority.

Over the last three decades, several conceptual frameworks for managing visitors at natural sites have emerged. Due to the importance of the tourists in sustainable heritage tourism, and because it is neither effective nor appropriate to manage heritage tourism resources in isolation from their owners and those who come to experience it, the main purpose of this chapter is to review these frameworks and to demonstrate their potential for managing visitors to cultural heritage sites and achieving sustainability.

To explore the critical elements, opportunities and challenges of using these frameworks for managing visitors at heritage sites, Petra Archaeological Park in Jordan is used as an example. After presenting some conceptual background information, this chapter uses qualitative interviews conducted with tourists to help determine indicators for their experience at Petra. Standards for crowding (a key indicator of the experience) at two important Petra attraction sites are subsequently assessed using a quantitative survey with tourists. Outcomes of both the interviews and surveys are used to draw conclusions about how to better manage visitors and their experiences at Petra.

## 5.2 Indicators and Standards-based Frameworks

Several frameworks have been developed and widely applied to nature-based parks, rather than heritage sites. They include limits of acceptable change (LAC) (Stankey *et al.*, 1985), visitor impact management (VIM) (Kuss *et al.*, 1995) and visitor experience and resource protection (VERP) (National Park Service, 1997). The major purpose behind all of these frameworks is to balance the protection of resources with the provision of quality experiences to visitors. Furthermore, all of these frameworks depend on three basic steps to address sustainability at a park (National Park Service, 1997; Manning, 2007, 2011; Manning *et al.*, 2011):

1. Formulate management objectives and associated indicators and standards.
2. Monitor indicators to determine if and where standards are violated.
3. Implement management actions to maintain indicators within the designated standards.

To identify and manage carrying capacity in the national park system, the US National Park Service developed the visitor experience and resource protection (VERP) framework (National Park Service, 1997); VERP is the focus of this chapter. This

framework is based on identification of objectives for the appropriate desired conditions of resource (both natural and cultural) and the visitor experience. Management objectives reflecting these desired conditions are expressed in the form of indicators and standards. The indicator variables are then monitored to make sure that the standards are maintained. If the standards are violated, then management actions should be taken to bring the indicators into compliance with the standards (National Park Service, 1997; Manning, 2001).

### 5.2.1 The concept of indicators

Indicators are defined as:

specific, measurable physical, ecological, or social variables that reflect the overall condition of a zone. Resource indicators measure visitor impacts on the biological, physical and/or cultural resources of a park; social indicators measure visitor impacts on the visitor experience.

(National Park Service, 1997, pp. 58–59).

To be effective, indicators should be both *manageable* and *measurable*. Good indicators should additionally be: specific, objective, reliable, repeatable, related to and sensitive to visitor use, and significant in defining the quality of the visitor experience (National Park Service, 1997; Manning, 2007, 2011).

Different approaches have been found in the literature to identify potential indicator variables. Many studies have used a qualitative approach to explore indicators by conducting semi-structured interviews with, or asking open-ended questions of, visitors and other stakeholders. For example, in a study about off-road vehicle (ORV) use at Cape Cod National Seashore, the researchers used open-ended questions and semi-structured interviews to gather information that helped formulate ORV indicators (Hallo *et al.*, 2009).

Other studies have used a quantitative approach. For example, a study conducted to estimate the social carrying capacity of Yosemite Valley, the scenic heart of Yosemite National Park, used close-ended survey questions to rate the seriousness of several issues (Manning *et al.*, 2002). Potential indicators were then selected from those issues that were rated most problematic. This quantitative, survey-based approach provides more generalizable results. However, qualitative approaches are often more valuable than quantitative ones for understanding the nature and significance of visitors' experiences (Glaspell *et al.*, 2003), and for developing indicator variables (Hallo *et al.*, 2009).

### 5.2.2 The concept of standards

A standard may be described as a 'minimum acceptable condition for each indicator variable' (National Park Service, 1997, p. 59). Standards are criteria used to evaluate environmental, social, and/or managerial goals. These management goals and related objectives are reflected by determining the appropriate indicators, and standards are quantifiable value judgments reflecting what management is attempting to achieve.

To be effective, standards should be characterized by being quantifiable, time- or space-bounded, impact-oriented, and attainable.

Standards allow managers to be proactive and establish priorities for management actions (Vaske *et al.*, 2002). By determining the desired environmental, social and managerial conditions by formulating standards, managers can pay attention to when impacts, whether physical or social, are approaching or exceeding the defined levels, rather than reacting to the problems after they occur (Whittaker and Shelby, 1992).

Standards can be derived from different sources of information, such as scientific literature, expert judgments, scientific research and public opinion, especially that derived from visitors (National Park Service, 1997; Manning, 1999; Manning *et al.*, 1999). Research on visitor-based standards has 'special appeal' because it involves visitors who are affected by the management decisions (Manning, 1999, p. 328; Manning *et al.*, 1999, p. 98). Research has depended heavily on use of normative theory to help formulate visitor-based standards.

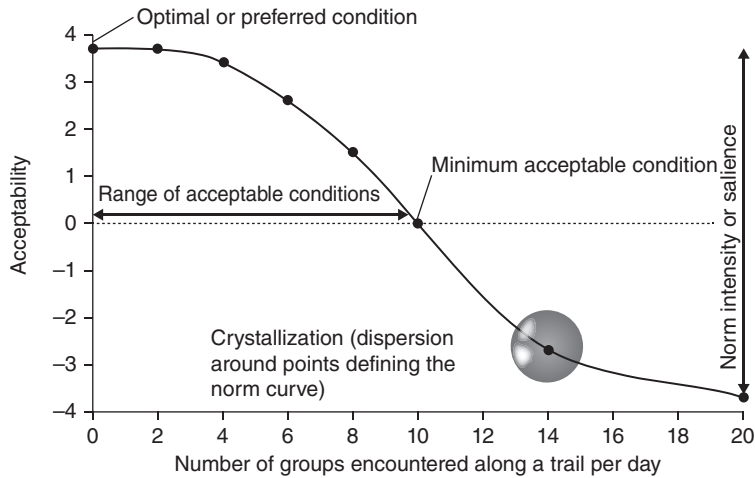
### 5.2.3 Normative theory

A large body of research indicates that normative theory is a reliable way to develop standards and evaluate different social, environmental, and/or managerial conditions at parks and related areas. Generally, norms refer to what is considered normal or acceptable within a social group (Manning, 2007, 2011); they represent standards and guidelines that specify how people are expected to behave under particular conditions (Balake and Davis, 1964; Calhoun *et al.*, 1997; Michener and DeLamater, 1999).

Structural characteristics models, which are widely used in the formulation of visitor-based standards in parks and related areas, aim to understand the characteristics of social norms by using the Return Potential Model (RPM) (Jackson, 1965). The RPM measures the relationship between behaviour and approval in or by a social group. The RPM (Fig. 5.1) includes two main components; the behaviour dimension ( $x$ -axis) that represents a number of possible behaviours or conditions of an indicator in a particular situation, and the evaluation dimension ( $y$ -axis) (e.g. acceptability). The return potential curve, also frequently termed a social norm curve, is plotted to describe group members' feelings about a specific behaviour dimension in a specific situation. Attitudinal ratings by individual group members are averaged and serve as the basis for the curve. Several features of the curve can be quantified to measure and describe different characteristics of norms such as the range of acceptable conditions, intensity of the norm, optimal or preferred condition, minimum acceptable condition, and crystallization (or consensus) of the norm (Jackson, 1965, 1966).

A newer method to understand the amount of consensus about a norm is the Potential for Conflict Index ( $PCI_2$ ) (Manfredo *et al.*, 2003).  $PCI_2$  ranges from 0 to 1. When the responses of an evaluation are equally divided between the acceptability scale this means less agreement on the norm evaluation, more conflict, and the least amount of consensus occurs ( $PCI_2=1$ ). Complete consensus and agreement on the norm evaluation lead to no potential for conflict ( $PCI_2=0$ ).  $PCI_2$  can be displayed on the social norm curve as bubbles. The smaller the bubble, the more consensus and less potential conflicts there are regarding the norm evaluation.





**Fig. 5.1.** Hypothetical social norm curve. (After Manning, 2011.)

Visitors to parks and related areas may share some norms for different resource and experiential conditions. These norms can be studied using the RPM by asking visitors to evaluate different park conditions. Two approaches have been used for measuring normative standards in parks and related areas; a traditional narrative and numerical approach (Shelby and Heberlein, 1986), and the visual approach (Manning *et al.*, 1996). Both approaches rely on asking visitors to evaluate the acceptability of a range of conditions for an indicator, but the way of presenting these conditions in a questionnaire differs. The narrative and numerical approach uses a description of conditions, while in the visual approach computer-manipulated photographs are used to portray the conditions. Both measurement approaches are valid, but in some specific situations some techniques can be more suitable (Manning, 1999). For example, in crowding-related research, a visual approach can be more appropriate (Manning, 1999; Manning and Krymkowski, 2010).

The appropriate evaluative dimension is one issue in these measurements approaches. Different evaluative dimensions have been used to rate a range of site conditions (Manning, 2007, 2011). *Acceptability*, which is a commonly used response scale, focuses on understanding the acceptable environmental, social, and/or managerial park conditions; *preference* aims to understand what conditions visitors prefer above others, *displacement* aims to determine the point that visitors would no longer visit the site; and *management action* focuses on understanding the conditions that visitors think managers should maintain (Manning, 2007, 2011; Manning and Krymkowski, 2010).

The normative approach described above has been widely applied to help support formulation of standards for indicators, primarily in nature-based parks and protected areas (Manning, 2007, 2011). Far less attention has been given to heritage sites, although a few exceptions exist. In a study examining visitor standards for crowding at Mesa Verde National Park in Colorado (which includes nearly 5000 known archaeological sites, including 600 cliff dwellings), visitors were asked to rate the acceptability of computer-edited photos showing a range of numbers of visitors/tour groups (Manning,

2007). By using the same approach, research was conducted to evaluate visitors' standards related to the number of people-at-one-time (PAOT) at the historic lighthouse on Little Brewster Island (Manning, 2007). Similarly, norm-based research helped estimate and manage carrying capacity of Alcatraz Island, a historic prison. Visitors' crowding standards for the prison cellhouse, which is the principal attraction on the island, were also evaluated by using a visual research method (Manning *et al.*, 2002).

### 5.3 Petra Archaeological Park

Petra, which covers an area of 264,000 m<sup>2</sup>, was designated a World Heritage Site by UNESCO in 1985 and subsequently selected as one of the New Seven Wonders of the World in 2007. Located in south-western Jordan, it is the most important tourist attraction in the country. Its total number of visitors in 2013 was 609,044 (Ministry of Tourism and Antiquities of Jordan, 2013).

Petra includes archaeological remains such as copper mines, temples, churches and other public buildings. The outstanding universal value of Petra lies in the sheer number of its ancient tombs and temples, religious sites, and the water systems. In 2009, the Petra Development and Tourism Regional Authority (PDTRA) was established to control the entire region (755 km<sup>2</sup>), including Petra, with the management of the archaeological site falling under the responsibility of the Petra Archaeological Park (PAP), which is a subordinate organization that reports to the PDTRA.

In response to the potential impacts of growth in tourism and the number of visitors, the government of Jordan invited five international institutions, including the US National Park Service, to prepare five management plans for Petra. However, there is little institutional memory of the procedure that was followed in the development of these plans (Akrawi, 2000, 2012). While these management plans have functioned as guiding documents for decision-makers, only the US National Park Service's Petra Operating Plan was approved by the Ministry of Tourism and Antiquities and none were officially approved by the Prime Ministry or implemented (Petra National Trust, n.d.). Although some plans included the participation of Jordanian counterparts, stakeholders were not involved in the identification of the values, the major issues, and the recommendations presented (Akrawi, 2000, 2012). Furthermore, these plans have followed the conventional approach in heritage management, focusing almost exclusively on the resource rather than the visitor experience.

The growing number of visitors to Petra has increasingly challenged the park managers charged with balancing their dual tasks of resource protection and high quality tourism provision. The UNESCO Reactive Mission to Petra in December 2010 called on the park managers to 'develop and implement a public use plan, including the definition of visitor management strategies' (World Heritage Committee, 2011, p. 100). Unfortunately, even though the apparent need exists and several VM frameworks have been proposed in various planning documents, their adoption and full implementation has not been realized in Petra. In addition, the carrying capacity research conducted for Petra has focused on the resource and ignored the visitor experiences (Comer and Beli, 1996; Magablih and Al-Shorman, 2009).

The remainder of this chapter presents a summary of outcomes from a study that is intended to help formulate empirical, science-based, tourist-informed indicators and standards for the tourism experience at Petra.

### 5.3.1 Indicators for the tourism experience at Petra Archaeological Park

Semi-structured qualitative interviews were conducted with tourists at Petra Archaeological Park. An interview guide was used that included a series of themes and lead-in questions, but sometimes additional questions were asked by the researcher for clarification. All interviews were conducted in the visitor centre after the completion of a tourist's trip, and were conducted in either Arabic or English.

Content analysis with an inductive coding approach was used to code the transcribed interview data. Inductive coding was adapted from methods initially described by Miles and Huberman (1994), Patton (2002) and Thomas (2006). In this approach the codes were developed from 'the frequent, dominant, or significant themes inherent in raw data' without requiring any restraints to use a structured methodology (Thomas, 2006, p. 238). Although codes were developed inductively, the core set of questions was used as an organizing tool.

Several questions were asked to gather information and understand the tourists and their experience at Petra. Respondents were first asked to describe three things they enjoyed most about their visit. Many responses to this question were described by predominantly experiential codes such as 'cultural heritage scenery', 'natural heritage scenery', and 'doing recreation activities' such as hiking and climbing. Some respondents replied to this question by referring to specific attractions in the park (e.g. the Treasury, Theatre, Al-Siq and the Monastery).

Respondents were next asked what three things they enjoyed least in their trip. The most frequently occurring codes were 'crowding', 'persistence of vendors', 'difficulty of walking' and 'odour of animal waste'. Lastly, respondents were asked about the most important thing affecting the quality of their experience at Petra Archaeological Park. 'The history of the site', 'the value of the site', 'crowding', 'difficulty in walking', 'persistence of vendors' and 'odour of animal waste' were the most frequent response codes.

Findings from these interviews suggest that cultural and natural scenic value, crowding, attraction accessibility, vendor persistence and odour of animal waste are potential indicators for the tourism experience at Petra. Indicators provide a theoretically-based, management-focused construct that define the essential qualities of the tourism experience. Indicators listed above can be addressed by the park management to enhance the tourism experience. Although the findings suggest important indicators for the tourist experience at Petra, more research is needed to identify the range of minimum acceptable conditions for each indicator. Thus, the indicators of the Petra tourism experience suggested here provide an empirical and defensible basis for the next step.

### 5.3.2 Standards for the tourism experience at Petra Archaeological Park

Crowding problems are one of the main issues affecting both Petra's resources and tourists' experiences (Magablih and Al-Shorman, 2009; Akrawi, 2012). This section focuses on identifying standards for the crowding indicator.

Crowding is one of the most common issues in heritage tourism management and it has received extensive attention in outdoor recreation management (Vaske and Shelby, 2008). It has a negative impact on both heritage resources

and tourist experience, especially during peak seasons. Crowding is a subjective evaluation of the number of encounters (Vaske *et al.*, 1986, 1993). It is often linked with the concept of carrying capacity that can be defined as the amount and type of use that can be accommodated at a site without unacceptably affecting the resources and tourists' experience (Manning, 1999; Budruk and Manning, 2002).

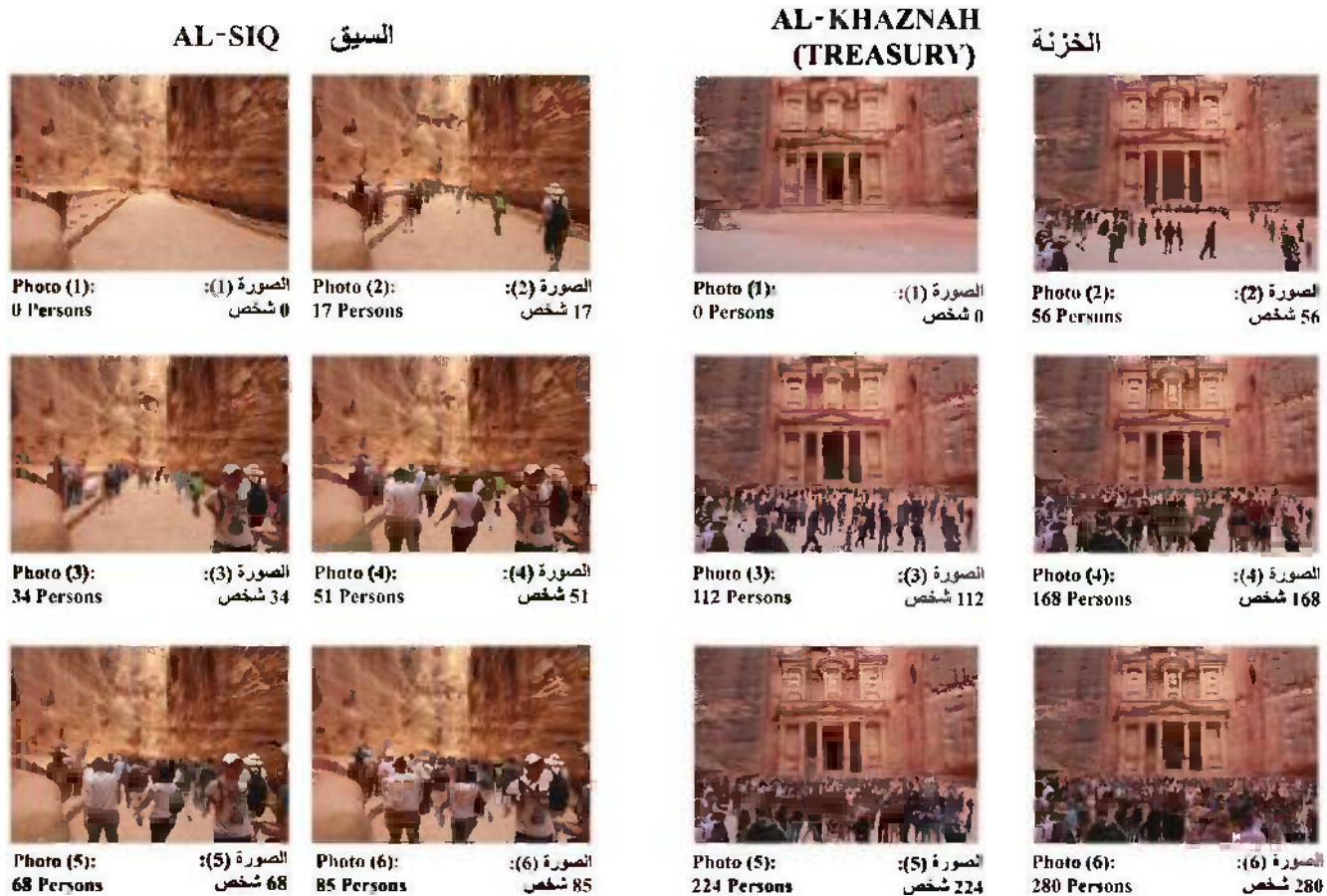
A quantitative survey using normative theory and methods was conducted to collect data to help formulate standards for crowding. A representative sample of tourists at Petra was asked to complete a self-administrated questionnaire as they exited the park. A systematic sampling protocol (e.g. asking every fifth tourist) was used to select survey respondents. The questionnaire was presented in English and Arabic: the original questionnaire was developed in English and then translated to Arabic, with the translated copy reviewed by a professional translator.

The survey included a set of questions employing visual methods to measure normative standards for two areas in the park, Al-Siq and Al-Khaznah (the Treasury). Tourists were asked to evaluate two series of six photos showing a range of tourist numbers in Al-Siq and Al-Khaznah (Fig. 5.2). All respondents were asked to evaluate the acceptability of each photo on a 9-point scale ranging from -4 (very unacceptable) to 4 (very acceptable). Social norm curves were constructed from response means for questions on the acceptability of the number of people in each photo. Tourists were also asked to evaluate the photos on other evaluative dimensions: their *preference*, when *management action* should be taken, when they would be *displaced* and no longer visit, and the number of tourists they *typically saw* in their trip.

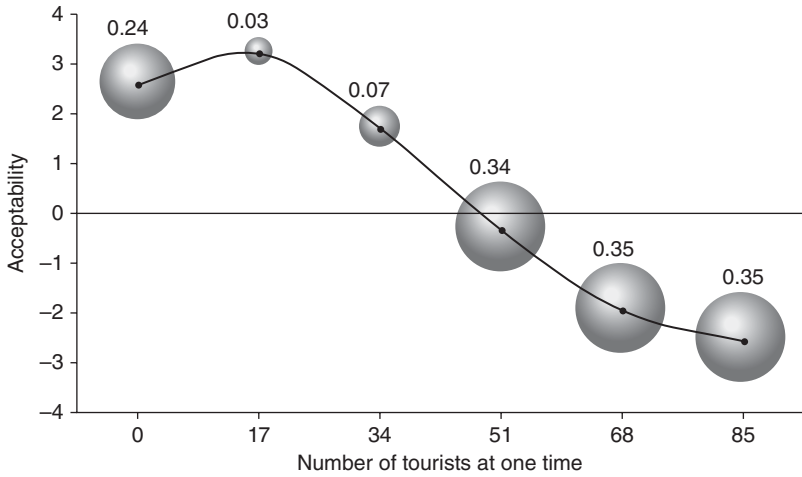
The number of tourists shown in the photos range from 0 to 85 for Al-Siq, and from 0 to 280 for Al-Khaznah. The social norm curves derived from the data for all tourists are illustrated in Figs 5.3 and 5.4.  $PCI_2$  is used to illustrate the consensus about the norm.

In general, the results show that for all tourists, acceptability decreases as the number of tourists increases. As shown in Fig. 5.3, as the number of tourists increased at Al-Siq from 0 to 85 in study photos, mean ratings for the acceptability for all tourists combined decreases from 2.6 to -2.6 on the response scale. For Al-Khaznah, as the number of tourists increases from 0 to 280 in the photos, mean ratings for the acceptability decreases from 2.76 to -3.12 (Fig. 5.4). Also, for all tourists combined, the range of acceptable number of tourists at Al-Siq is from 0 to 48 tourists at one time, and for Al-Khaznah it is from 0 to 135 tourists. The optimum number of tourists at one time for Al-Siq is 17 (because it received the highest rating of acceptability from the sample as a whole), whereas for Al-Khaznah it is 56. The maximum acceptable number of tourists at one time for Al-Siq is 48 and for Al-Khaznah is 135.

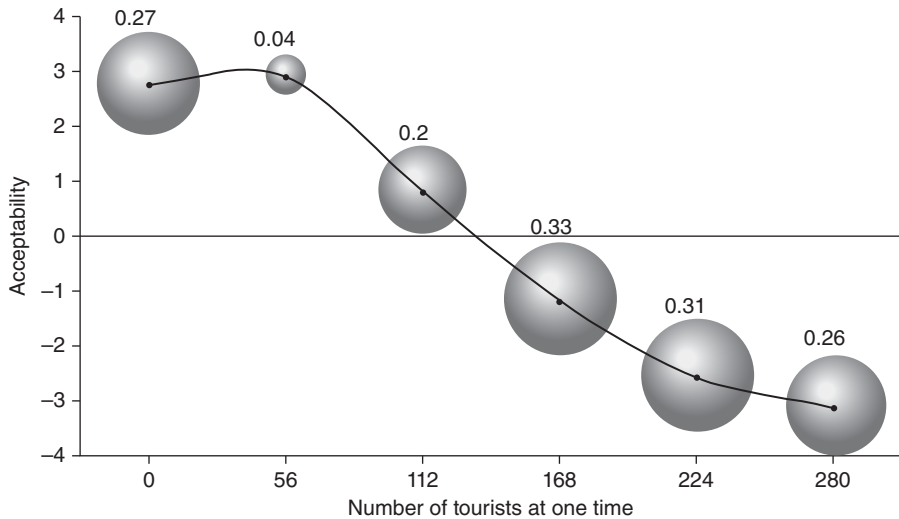
The  $PCI_2$  for acceptability evaluation ranges from 0.03 to 0.35 at Al-Siq (Fig. 5.3), and from 0.04 to 0.33 at Al-Khaznah (Fig. 5.4). The bubbles in Figs 5.3 and 5.4 represent the  $PCI_2$  of the evaluation for each photo; the larger the bubble, the greater potential for conflict. The  $PCI_2$  values indicated that there is a variation in the consensus regarding the acceptability evaluations, especially when the evaluation is below 0 (i.e. is unacceptable).



**Fig. 5.2.** The two series of six photos used in the study, showing a range of tourist numbers in Al-Siq and Al-Khaznah (the Treasury), Petra. The number of people in each photo is indicated and information is given in both English and Arabic.



**Fig. 5.3.** Social norm curve for acceptability of number of tourists at one time at Al-Siq, shown with  $PCI_2$  (bubbles).



**Fig. 5.4.** Social norm curve for acceptability of number of tourists at one time at Al-Khaznah (the Treasury), shown with  $PCI_2$  (bubbles).

## 5.4 Discussion and Conclusion

Although sustainability of heritage tourism has become a major concern from the perspectives of both academics and practitioners, the majority of research has tended to understand the cultural and educational issues of heritage tourism rather than focusing on the application of sustainability in a practical context (Millar, 1989; Fyall and Garrod, 1998). To achieve sustainability of heritage tourism, heritage sites should be managed effectively in a way that ensures preservation of

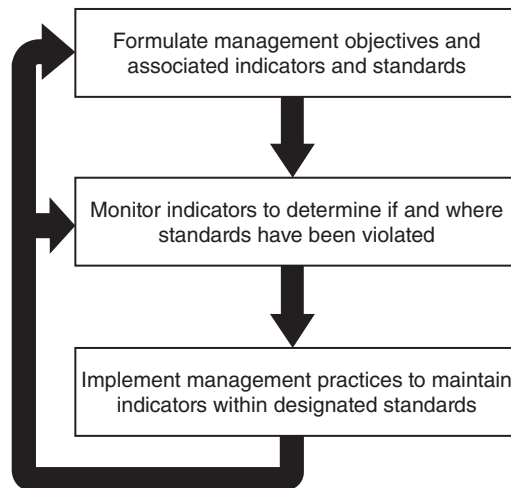


heritage resources and provides quality experiences to the tourists (McArthur and Hall, 1993, 1996; Glasson *et al.*, 1995).

Traditionally, heritage tourism planning and management relies on a top-down, professional-led approach that ignores the interests of different stakeholders (e.g. heritage tourists) in heritage attractions. Furthermore, strategies for heritage tourism management have conventionally focused on the supply side (i.e. the resource) and ignored the demand side (i.e. the tourists). Recently, it was recognized that involving tourists in the management process is a key element to achieve sustainability; therefore, the global trends in heritage tourism are now moving forward from a product-led approach that underlies exhibits and education, to a more tourist-oriented approach that focuses on consumer preferences and quality of personal experiences (Apostolakis and Jaffry, 2005). Indeed, sustainability in heritage tourism cannot be achieved without involving heritage tourists and understanding their experiences at heritage attractions. Highly satisfied tourists and involved stakeholders are a key to the long-term public support for the protection of heritage sites.

It was suggested by Manning *et al.* (2011) that sustainability can be applied through development and implementation of contemporary indicators and standards-based frameworks. The major purpose behind all of these frameworks is to balance the protection of resources with the provision of quality experiences to the visitors. In addition, all of these frameworks depend on three main elements (Fig. 5.5). Firstly, management objectives and associated indicators and standards are formulated. Secondly, indicators are monitored to ensure that standards are maintained. Finally, management actions are implemented to maintain indicators within the designated standards. These frameworks have been developed and widely applied to nature-based parks, rather than heritage sites.

This chapter explores tourists and their experiences at Petra Archaeological Park and how that experience might be managed to promote the sustainability of heritage tourism. Findings suggested that cultural and natural scenic value, crowding, attraction accessibility, vendor persistence and odour of animal waste are potential



**Fig. 5.5.** Main elements of indicators and standards-based frameworks. (After Manning, 2014.)



indicators for the tourism experience at Petra. This research focuses on the crowding indicator and applies normative theory to gather information to formulate empirical, tourist-based standards for crowding at Al-Siq and Al-Khaznah (the Treasury) in Petra. In general, results show that tourists' acceptability levels decline with an increasing number of tourists. The maximum acceptable number of tourists at one time was 48 at Al-Siq, and 135 at Al-Khaznah. However, tourist crowding standards are not violated at either location because all evaluative dimensions (except the preference dimension) were below the number of tourists reported as typically seen.

The main management implication of this study lies in providing Petra managers with information that can help in applying one of the indicators and standards-based frameworks. The potential indicators identified in this chapter show the key elements to be focused on in the park in the management process to ensure high quality experiences for tourists. Managers at Petra can use these variables as starting points to select the final list of indicators. Positive indicators such as cultural and natural scenic value of the park can be used in the marketing process to attract more tourists. Findings of this research show that Petra Archaeological Park provides the tourists with an experience that comprises a unique combination of cultural and natural heritage features. Therefore, the park management should consider this kind of combination in marketing strategies when promoting the site.

Given that crowding was an important factor in the tourist experience in Petra, this research provides the acceptable limits of tourist numbers that managers should allow at Al-Siq and Al-Khaznah. These standards can be used to apply the concept of carrying capacity at the park through one of the management frameworks mentioned earlier. These frameworks require number of tourists to be monitored; if monitoring reveals that tourist numbers violate the standards set to manage crowding, then carrying capacity has been exceeded and management action should be implemented.

Normative theory has been widely used in nature-based outdoor recreation areas to formulate indicators and standards to manage visitor experiences. Generally, the present research can be considered one of the few projects that applies social norms and the concepts of indicators and standards to heritage sites. At the local level, this study was the first in Jordan to empirically consider the tourists and their experiences in managing Petra Archaeological Park. Most of the studies on VM at Petra have thus far ignored the tourist dimension and followed the traditional approach of heritage management. Finally, this chapter attempts to extend the body of knowledge on heritage tourism management by understanding tourists' experiences and perspectives, and involving tourists in planning and decision-making processes. In the future, the perspectives of tourists will become an even greater component of heritage tourism management and the sustainability of heritage sites.

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# 6

## Managing Nature-based Visitors' Perceived Service Quality, Satisfaction and Future Behaviour Intention

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### 6.1 Introduction

The relationships between service quality, satisfaction and future intention behaviour have been extensively discussed in the tourism literature. There is consensus that quality is central to success in the delivery of tourism services and therefore the long-term attainment of visitor management (VM) is linked to service quality (Crompton and Love, 1995). It also seems logical to posit that improvement in service quality will result in an increase in visitor satisfaction, positive referrals and repeat visits, all of which eventually impact the financial performance and political support of tourism providers.

Within the context of nature-based tourism, reliance on the quality of nature and delivery of services is paramount to optimize visitor experience. As highlighted by Eagles (2002, p. 132), 'nature-based tourism [...] is heavily dependent upon two fundamental components: (1) appropriate levels of environment quality and (2) suitable levels of consumer service'. While tensions between conservation and development have been an issue in nature-based tourism, it is apparent that a high level of quality experience would eventually result in support for nature and interest in conservation (McCool, 2006). Traditionally, the role of nature-based tourism operators has been to function as an environmental educator or an advocate for protection, but now it has shifted to that of a customer service agent with emphasis on the issue of quality (O'Neill *et al.*, 2010). Consequently, service quality, visitor satisfaction and future intention behaviour (i.e. repeat visitation) are a vital part of VM tools in nature-based tourism. Based on this approach, the objective of this chapter is to first delineate each construct (service quality, satisfaction and future intention), and then to discuss their interrelationships based on a case study at a nature-based destination, a national park.

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## 6.2 Service Quality

The topic of service quality has been a prevailing research theme in the marketing, leisure and tourism disciplines. The topic of service quality has grown significantly with the launch of a SERVQUAL model developed by Parasuraman *et al.* (1985, 1988). The authors' conceptualization and measurement of service quality has been a very popular reference in the service quality literature. SERVQUAL has been particularly important due to two major contributions: dimensionality and measurement.

### 6.2.1 Dimensionality of service quality

One of the major contributions of SERVQUAL is the dimensionality of service quality. Parasuraman *et al.* (1988) reported that there were five dimensions of service quality based on a scale of 22 items: tangibles, reliability, responsiveness, assurance and empathy (Table 6.1). While the use of these dimensions has been evident, several researchers have raised questions about its generalizability (Cronin and Taylor, 1992; Schneider and White, 2004). They suggested that there is no universal consensus related to the dimensions across settings. Moreover, Carman (1990) found that the items of SERVQUAL were not completely generic. He suggested that more replication and testing of the instrument were needed. Therefore, there has been general agreement that it is necessary to customize the instrument to the specific research needs of different service settings. Based on the suggestions, the SERVQUAL instrument has been considerably tested, adapted and replicated to different service settings. Hybrid scales such as LODGSERV in the lodging industry (Knutson *et al.*, 1990), DINESERV in the restaurant industry (Knutson *et al.*, 1995) and RECQUAL in commercial recreation sectors (Mackay and Crompton, 1990) are examples of industry-specific SERVQUAL instruments.

Similarly, in the tourism discipline, the service quality concept and associated instrument have also been employed in various settings. One of the earliest adoptions of SERVQUAL was used to measure four service segments in the tourism industry. Results demonstrated the utility of the instrument in multi-tourism service segments (Fick and Ritchie, 1991). Since then, SERVQUAL has been widely used as a baseline instrument to measure service quality in various tourism settings such as zoos (Crilley, 2005), forests (Absher, 1998), local tourism destinations (Bhat, 2012; Canny, 2013) and even in health tourism (Jyothis and Janardhanan, 2009).

**Table 6.1.** SERVQUAL dimensions and definitions. (From Parasuraman *et al.*, 1988.)

Dimension	Definition
Tangibles	The physical facilities, equipment, and appearance of personnel
Reliability	The ability to perform the promised service dependably and accurately
Responsiveness	The willingness to help customers and provide prompt service
Assurance	The knowledge and courteousness of employees and their ability to inspire trust and confidence
Empathy	The caring and individualized attention provided to customers

Within nature-based tourism, SERVQUAL is considered as a useful instrument and utilized extensively (Akama and Kieti, 2003). A notable example of the adaptation and application of SERVQUAL is ECOSERV (Kahn, 2003). The ECOSERV instrument was developed for an ecotourism setting and consists of 30 items grouped into six dimensions. It is comparable to the service dimensions (assurance, reliability, responsiveness and empathy) from the original SERVQUAL instrument. However, the tangibles dimension was split into two dimensions: ecotangibles and tangibles. The ecotangibles dimension is particularly focused on the physical facilities and equipment that are environmentally safe and appropriate. Indeed, the tangibles dimension is more emphasized when the focus is on nature-based tourism services. That is, tourism services such as transportation, lodging and food supply, or recreation services such as trails, shelters, signs and information boards become more prominent factors (O'Neill *et al.*, 2010).

Other approaches have also been developed to measure service quality. Grönroos' (1984) model of two dimensions includes technical and functional quality. Technical quality reflects an actual service provided and outcomes of service performance, whereas functional quality represents the interactions and subjective way that the service is delivered. Based on SERVQUAL and Grönroos' model, Brady and Cronin (2001) suggested three dimensions of service quality, such as service delivery (interaction), service environment and service outcome. Service delivery reflects interpersonal interactions between service providers and customers. Service environment considers the influence of the physical or built environment on customers' evaluation. Service outcome is the actual service and what the customer is left with after the service is provided. Researchers in the field of leisure and tourism have utilized these models to measure service quality in various settings (Shonk, 2006; Clemes *et al.*, 2011; Howat and Assaker, 2013).

In particular, Chen *et al.* (2011) revised and utilized the service quality models by Brady and Cronin (2001) in a national park setting. They operationalized service quality with four primary dimensions and eight sub-dimensions. It was equivalent to three service dimensions from the original model. Personal interaction was related to personnel and interpretation services. Physical environment was explained with physical facilities and environment quality. Technical quality was determined with recreational facilities and venue quality. The final dimension was access quality, which pertained to convenience quality and information quality.

Customization of instruments to fit specific destination settings has been another approach to measure service quality rather than reliance on the original SERVQUAL or other service quality models. For example, in a national park setting, service quality was assessed with three dimensions. Tourism facilities included shops, transportation, lodging, restaurants and information; hospitality was explained with friendliness and willingness of the service personnel; landscape and environment related to the beauty, peacefulness and safeness of the place (Neuvonen *et al.*, 2010). In a forest setting, Jaten and Driver (1998) emphasized the need for 'meaningful measures for quality recreation management'. They asserted the importance of establishing quality standards throughout parks and identified four dimensions of service quality: health and safety, general recreational setting, safety and security, and responsiveness to customer need.



## 6.2.2 Measurement of service quality

Another major contribution of SERVQUAL is related to its measurement. Parasuraman *et al.* (1985, 1988) identified the various 'gaps' that affect service quality as perceived by consumers based on expectancy-disconfirmation theory of satisfaction study. Among the gaps, the difference between customers' expectations of service and their perceptions of the service is defined as perceived service quality. That is, expectations can be disconfirmed positively when perception is better than the expected service, or negatively when perception is worse than the expected service. Following the introduction of the disconfirmation measure, this operationalization has been extensively used in nature-based tourism (Absher, 1998; Said *et al.*, 2013). For example, Akama and Kieti (2003) sought to discover whether the decline in visitor numbers to a Kenyan national park was a result of the service quality provided. Using a disconfirmation measure of service quality, they examined if there were any discrepancies between tourists' expectations and perceptions of the quality of the services. The results showed that the perceptions of the quality exceeded the expectations in most attributes and thus the quality of the park was not responsible for the poor performance in the volume of the visitors. This study demonstrates that the disconfirmation measure of service quality can provide a significant diagnostic value to a nature-based tourism destination.

While the disconfirmation measure has been extensively cited in the academic literature, criticism regarding its operational problems have also emerged (Carman, 1990; Cronin and Taylor, 1992; Teas, 1993). Ambiguous questions in the survey and inflexible administration have been reported (Teas, 1993). As an alternative to the disconfirmation-based SERVQUAL, Cronin and Taylor (1992) developed a performance-only measurement, SERVPERF. They suggested that SERVPERF provides more construct-valid explication of service quality than SERVQUAL. They also insisted that having fewer items (excluding the expectation measurement) provides better efficiency.

In the field of leisure and tourism, criticism of disconfirmation has increased and researchers have supported the superiority of simple performance-based measures of service quality. Crompton and Love (1995) tested the predictive validity of several alternative operationalizations of service quality in the context of a festival. Results showed that respondents did not form meaningful expectations against which they measured performance to determine quality. With a similar rationale, many researchers used a performance-only measurement to determine the aspects of service quality in various nature-based tourism settings such as a national forest (Absher, 1998; Lee *et al.*, 2004) and a national park (Neuvonen *et al.*, 2010; Chen *et al.*, 2011). Consensus has yet to be reached as to the better of the disconfirmation and performance-only approaches, but it is generally acknowledged that each measure is useful in measuring service quality and is dependent on the purpose of study (Parasuraman *et al.*, 1994).

## 6.3 Satisfaction

### 6.3.1 Conceptualization of satisfaction

Floyd (1997, p. 83) stated that 'satisfaction is one of the most central concepts in the study of recreation behavior' and satisfaction has been one of the most researched



concepts in parks and tourism research (Manning, 1999). An individual is viewed as a cognitive and rational information processor who is influenced by emotions and feelings. Satisfaction can therefore be studied in two paradigms: emotional response and cognitive evaluation. Satisfaction can be explained as an emotional response derived from a consumption experience (Hunt, 1993; Spreng *et al.*, 1996) or an individual's positive feelings caused by engaging in leisure choices (Beard and Ragheb, 1980). On the other hand, Hunt (1977, p. 459) emphasized the cognitive side of satisfaction as 'not the pleasurable nature of the experience, it is the evaluation rendered that the experience was at least as good as it was supposed to be'.

Even though consensus has not been reached yet about the argument between the two approaches, most previous satisfaction studies have used the cognitive way of understanding (Del Bosque and San Martín, 2008). Based on a cognitive approach, Neal and Gursoy (2008) categorized tourism satisfaction as following four theoretical models. First, the expectancy-confirmation model (Oliver, 1980) explains satisfaction with discrepancy between customers' expectations and actual performance. If the actual performance exceeds their expectation, a positive disconfirmation occurs. On the other hand, if the actual performance does not exceed their expectation, a negative disconfirmation occurs. Second, norms theory (Woodruff *et al.*, 1983) works similarly to the expectancy-confirmation model but norms are used as reference points to evaluate services. Norms could be developed not only through customers' previous experiences with the same services but also based on their experiences with similar services. Third, equity theory explains satisfaction as the relationship between the costs associated with the purchase and the benefit they anticipate (Neal and Gursoy, 2008). If the costs inclusive of price, time and effort surpass the benefit expected, consumers will not be satisfied with the service rendered. Finally, the performance-only model (Burns *et al.*, 2003) is noted as the alternative measure in comparison to the expectancy-confirmation model. It suggests that the contrast between expectation and actual performance is not necessary.

Recently, a study attempted to understand tourism satisfaction as a combination of cognitive and affective approaches (Del Bosque and San Martín, 2008). Satisfaction of the tourists depends on the evaluation of certain features such as natural scenery, tourism infrastructures and activities. However, when the tourists have negative or positive emotions (e.g. boredom, disappointment vs. pleasure, impression) during the experience, it certainly influences satisfaction negatively or positively.

### 6.3.2 Importance-performance analysis

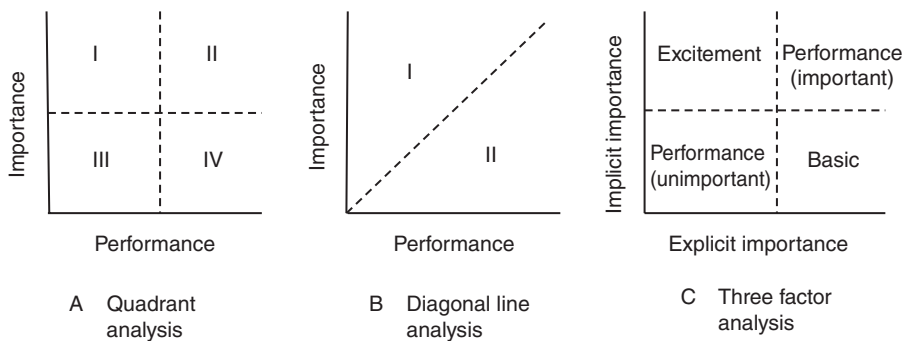
Importance-performance analysis (IPA), introduced by Martilla and James (1977), has been used as a valuable tool for both satisfaction measurement and resource allocation. IPA is a simple, graphical and effective way to evaluate quality attributes on two dimensions: importance and performance. Scores are extracted from Likert scales and plotted onto a two-dimensional matrix (Fig. 6.1A). This matrix classifies mean scores into four categories to assess management priorities (Wade and Eagles, 2003, p. 197):

1. Keep up the good work: importance and performance ratings both meet or exceed service quality standards.
2. Concentrate here: importance and performance ratings both fall short of service quality standards.

3. Low priority: performance scores do not meet the service quality standard, but respondents do not place a high level of importance on the service.
4. Possible overkill: performance scores meet or exceed service quality standards, but a low level of importance is assigned to this particular service.

While a quadrant analysis is the most common method to infer priorities for improvement, other strategies of mapping techniques exist. A diagonal line analysis (Fig. 6.1B) uses a diagonal line to separate regions of differing priorities (Bacon, 2003). Scores above the upward slopes indicate that importance exceeds performance, with the latter needing improvement (I); whereas scores below the line represent the opposite (II). Three factor analysis of IPA (Fig. 6.1C) distinguishes three categories of attributes: basic factors, excitement factors and performance factors (Lai and Hitchcock, 2015). The strategic actions for this approach are to satisfy all basic factors, to be competitive regarding performance factors and to be excellent with regard to excitement factors.

In the field of leisure and tourism, IPA has been widely used due to its practicality and effectiveness for management decisions and resource distribution. Studies of various tourism settings such as sustainable tourism (Sörensson and von Friedrichs, 2013), culinary event tourism (Smith and Costello, 2009) and wine tourism (O'Neill and Palmer, 2004) proved that IPA has been a useful tool to measure satisfaction and pinpoint which quality attributes need improvement. IPA has also been demonstrated to be a valuable measurement in a setting of nature-based tourism such as reef tours (Coghlan, 2012), hot spring tours (Deng, 2007) and shark tours (Ziegler *et al.*, 2012). In particular, Wade and Eagles (2003) applied the IPA to measure satisfaction in Tanzanian national parks. They showed that IPA works as an effective diagnostic tool to provide an understanding of the relationship between satisfaction and importance. It also highlighted the utility of the techniques, which easily identify the areas of service strength, overkill, low priority and need for concentration. Even though validity and reliability concerns continue to be an issue in the study of IPA (Azzopardi and Nash, 2013), it is evident that IPA would still be a popular satisfaction measurement in the field of leisure and tourism.



**Fig. 6.1.** IPA mapping analyses: (A) quadrant analysis, (B) diagonal line analysis, (C) three factor analysis. (From Lai and Hitchcock, 2015.)

## 6.4 Differences between Service Quality and Satisfaction

Researchers acknowledge that the measurement of consumers' perceptions of satisfaction and service quality are confounded, but also suggest that these are distinct constructs (Parasuraman *et al.*, 1988; Bolton and Drew, 1991; Crompton and Love, 1995). There are three perspectives to distinguish satisfaction from service quality. (i) Satisfaction is defined as subjective evaluation while service quality is viewed as objective judgment (Oh and Park, 1997). For example, service quality in a state park can be evaluated by cleanliness of the toilets and campsite facilities. However, satisfaction can be influenced by weather, water level and social interactions, as well as the service quality provided. (ii) Satisfaction includes experiential aspects of service from a consumer's perspective, whereas service quality relies on supplier expertise (Crompton and Love, 1995). Hence, park managers can exercise some control over service quality, but satisfaction with services is at least partially outside the managers' control. (iii) Perceived service quality is a more specific judgment and satisfaction is the broader overall evaluation (Oliver, 1993). Thus, quality is sampled on each occurrence and accumulates over time to result in overall satisfaction. Consequently, service quality is recognized as an antecedent of satisfaction in nature-based tourism (Chen *et al.*, 2011). It is also suggested that satisfaction has a stronger effect on future intentions than service quality in a forest setting (Lee *et al.*, 2004). Accordingly, it is important for a nature-based tourism organization to be able to determine which components of a service significantly contribute to visitor satisfaction (Petrick and Backman, 2002).

## 6.5 Future Intention

Future intention has been an important variable because it may accurately represent actual behaviour. As Fishbein and Manfredo (1992, p. 33) explain, 'Considerable research demonstrates that, when properly measured, correspondent intentions are very accurate predictors of most social behaviors'. Further, a few studies have defined loyalty as 'an intended behavior related to the service or the provider' (Andreassen and Lindestad, 1998, p. 84). Future intention often has been used as a measurement of loyalty because repeat intentions are supposed to reflect the long-term construct of actual repeat behaviour (Webster and Sundaram, 1998). Future intention is operationalized as word-of-mouth and visitors' returning intention (Chen *et al.*, 2011). Researchers have developed models to depict future intentions as a final consequence of tourism and leisure behaviours (Baker and Crompton, 2000; Kozak and Rimmington, 2000; Tian-Cole *et al.*, 2002; Chen and Chen, 2010). In particular, future intention has been understood as an important concept with its antecedents, such as service quality and satisfaction, in nature-based tourism (Lee *et al.*, 2004; O'Neill *et al.*, 2010; Chen *et al.*, 2011).

## 6.6 Case Study

### 6.6.1 Introduction

Based on the aforementioned review, the following case study evaluates the dimensions of service quality and ascertains tourist satisfaction with the attributes of service

quality and their future intention behaviour. It focuses on tourists visiting a large national park in Zambia based on the following objectives: (i) to identify the dimensions of perceived service quality; and (ii) to examine the relationships among perceived service quality, satisfaction and future intentions to visit. It is hypothesized that perceived service quality is related to satisfaction and future intention and satisfaction is related to future intention behaviour.

### 6.6.2 Kafue National Park: overview

At 22,480 km<sup>2</sup>, Kafue National Park (KNP) in Zambia is vast, and it contains notable natural attributes including scenic landscapes, rivers and an abundant variety of wildlife. The park is one of the largest in Africa and is relatively undeveloped, which has its own attractive appeal among visitors, given its wilderness quality (Thapa, 2013). The park is relatively close to a major population centre – the capital city Lusaka – which draws day visitors, but overnight visitation is very low (approximately 8000 visitors). While major investment in hard and soft infrastructure is required to increase visitor influx, the government has noted this as a priority (Thapa, 2012). KNP has its own uniqueness but faces major competition for wildlife-oriented visitors from other parks within Zambia and the southern Africa region. The assessment of visitors' perceived service quality, satisfaction and future intentions to visit is an important benchmark exercise for park personnel to understand issues, and accordingly optimize experiences in KNP.

### 6.6.3 Methods

#### *Sample*

Based on an on-site tourist intercept method, a total of 152 visitors completed the questionnaire. The majority of the sample was male (53%), married or partnered (72%) and had a college degree (80%). The majority of the respondents visited the park with friends and family (80%). Approximately half of the respondents were international visitors and had visited the park before (Table 6.2).

#### *Survey instrument*

A set of questions measuring service quality of KNP was developed based on Brady and Cronin's (2001) service quality model. Questions related to interactions between staff members and park visitors, and accessibility of accurate and current information contained a dimension of service delivery. Park facility and road condition questions related to quality of service environment. Quality of service outcome was achieved with questions regarding the opportunity to observe and experience wildlife and wilderness. Visitor satisfaction was measured using questions related to enjoyment, value and overall experience. Finally, future intention was measured with a single item regarding the visitors' willingness to return to the park. All items were measured using a 5-point Likert scale (1=strongly disagree, 5=strongly agree).

#### *Statistical analysis*

First, a factor analysis was undertaken to validate the underlying factors of service quality. Second, a reliability test was conducted to check the internal consistency of each

**Table 6.2.** Socio-demographic profile of visitors sampled at Kafue National Park, Zambia.

		Frequency (n=152) <sup>a</sup>	%
Gender	Male	77	52.7
	Female	69	47.3
Age (years)	16–29	11	11.1
	30–39	22	22.2
	40–49	23	23.2
	50–59	24	24.2
	60–69	17	17.2
	70 and above	2	2.0
Education	Less than high school	2	1.4
	High school graduate	26	18.3
	Technical school or college graduate	64	45.1
	Graduate, medical or law degree	50	35.2
Marital status	Single	41	28.3
	Married/partnered	104	71.7
Type of travel group	Came alone	8	11.0
	Family	15	20.5
	Friends	25	34.2
	Family and friends	18	24.7
	Tour group	5	6.8
	Others	2	2.7
Previous experience	Yes	67	50.4
	No	66	49.6
Citizen status	Citizen or residents	75	49.3
	Non residents	77	50.7

<sup>a</sup>Some respondents did not provide information about gender, age, education, etc. Therefore, the total number of respondents for some variables do not add up to 152. The percentage values are based upon the number of respondents who provided information.

construct. Cronbach's alpha ( $\alpha$ ) is an indicator of reliability associated with a variation accounted for by the score of the underlying construct (Hatcher, 1994). Third, correlation analysis was conducted to examine the relations among the dimensions of service quality, satisfaction and future intention. Finally, data were analysed using a multiple regression analysis to examine three main relationships between service quality dimensions and (i) satisfaction, (ii) future intention and (iii) satisfaction and future intention.

#### *Factor analysis and reliabilities*

The factor analysis with a principal component procedure and a varimax rotation was used to understand the structure of sub-dimensions of service quality. It generated a three-factor solution (Table 6.3). The first factor comprised four items related to the

**Table 6.3.** Factor analysis and reliabilities, Kafue National Park study.

Items	Staff and information	Physical facilities	Accessibility to wildlife
	Factor loading <sup>a</sup>		
Information about nature and cultural tourism opportunities	0.73		
Ease of obtaining current and accurate park information	0.80		
Availability of staff to answer questions	0.74		
Courteous and friendly park staff	0.76		
Condition of roads and facilities		0.81	
Comfort and quality of lodges/camps		0.69	
Accessible roads to the park and/or airstrip		0.79	
Opportunity to experience close observation of wildlife			0.76
Abundance of biodiversity and wildlife			0.80
Eigen value	3.64	1.44	1.11
Variance explained	40.4	16.0	12.3
Reliability coefficient	0.80	0.72	0.72

<sup>a</sup>Principal component procedure with varimax rotation.

quality of staff and information ( $\alpha=0.80$ ). The second factor indicated physical facilities, such as roads and lodging ( $\alpha=0.72$ ). The third factor comprised two items that explained the opportunity to observe and experience wildlife and wilderness ( $\alpha=0.72$ ). Combined, these three factor groupings accounted for almost 69% of the total variance. The delineated factor groupings had an eigenvalue of 1 and each of the service quality constructs indicated an acceptable internal consistency from a reliability value.

#### 6.6.4 Results

The means for each of the items are given in [Table 6.4](#). The highest mean value for service quality items was for courteous and friendly park staff (4.07) followed by the availability of staff to answer questions (3.60). On the other hand, the respondents rated the lowest mean value for condition of the roads and facilities (2.48) followed by information about nature and cultural tourism opportunities (2.50), and ease of obtaining current and accurate park information (2.74). The mean value of satisfaction items ranged from 3.57 to 4.27. The mean value of future intention was 3.92.

Correlation analyses were conducted to examine the relationship among service quality dimensions, satisfaction and future intention ([Table 6.5](#)). Significant relationships between all dimensions of service quality and satisfaction existed. Also, the relationship between satisfaction and future intention was significant. However, the relationship between service quality dimensions and future intention was not statistically significant.

A multiple regression model was then conducted to examine the relationship between the three dimensions of service quality and satisfaction ([Table 6.6](#)). According

**Table 6.4.** Means and standard deviations, Kafue National Park study.

Items	Mean <sup>a</sup>	SD
<b>Staff and information</b>		
Information about nature and cultural tourism opportunities	2.50	1.12
Ease of obtaining current and accurate park information	2.74	1.20
Availability of staff to answer questions	3.60	1.24
Courteous and friendly park staff	4.07	0.96
<b>Physical facilities</b>		
Condition of roads and facilities	2.48	1.15
Comfort and quality of lodges/camps	3.53	1.04
Accessible roads to the park and/or airstrip	3.00	1.16
<b>Accessibility to wildlife</b>		
Opportunity to experience close observation of wildlife	3.39	1.13
Abundance of biodiversity and wildlife	3.34	1.07
<b>Satisfaction</b>		
My visit to the park was less enjoyable than I expected <sup>b</sup>	4.27	0.62
My trip to the park was well worth the money I spent	3.69	1.00
My overall experience in the park was perfect	3.57	1.02
<b>Future intention</b>		
I will likely revisit the park	3.92	0.91

<sup>a</sup>5-point Likert scale (1=strongly disagree, 5=strongly agree); <sup>b</sup>reverse coded.

**Table 6.5.** Correlations among dimensions of service quality, satisfaction and future intention, Kafue National Park study.

	Staff and information	Facilities	Wildlife	Satisfaction	Future intention
Staff and information	1				
Facilities	0.44**	1			
Wildlife	0.27**	0.41**	1		
Satisfaction	0.27**	0.34**	0.37**	1	
Future intention	0.00	0.03	0.19*	0.44**	1

\*, correlation is significant at the 0.05 level (2-tailed); \*\*, correlation is significant at the 0.01 level (2-tailed).

to the results, the model was significant at 0.001 ( $t$ -value of 7.50). The adjusted coefficient of determination (adjusted  $R^2$ ) revealed that about 17% of the variance in satisfaction was explained by three dimensions of service quality in the regression model. Further, this study performed  $t$ -tests for each service quality dimension separately to determine which dimensions were the most important for visitor satisfaction. The results showed that accessibility to wildlife was recognized as the most significant service quality dimension that influences visitor satisfaction ( $\beta=0.29$ ,  $P<0.01$ ).



**Table 6.6.** Relationship between dimensions of service quality and satisfaction, Kafue National Park study.

Independent variables	$\beta$	t-value	Adjusted R <sup>2</sup>	t-value
			0.17	7.50*
Accessibility to wildlife	0.29	2.76*		
Physical facilities	0.20	1.81		
Staff and information	0.07	0.65		

Dependent variable: Satisfaction. \*,  $P < 0.01$ .

**Table 6.7.** Relationship between satisfaction and future intention, Kafue National Park study.

Independent variable	$\beta$	t-value	Adjusted R <sup>2</sup>	F-value
Satisfaction	0.44	5.72*	0.19	32.74*

Dependent variable: future intention. \*,  $P < 0.001$ .

Another regression model analysed the relationship between the three dimensions of service quality and future intention. According to the results, the model was not significant. That is, the three dimensions of service quality did not significantly influence the decision of visitors' future intention. Finally, the relationship between satisfaction and future intention was examined (Table 6.7). As a result, the F-value of 32.74 was significant. The adjusted  $R^2$  revealed that about 19% of the variance in future intention was explained by satisfaction in the regression model. Furthermore,  $\beta$  was 0.44 and was statistically significant ( $P < 0.001$ ).

### 6.6.5 Discussion

The purpose of this study was to identify the dimensions of service quality, and to examine relationships between service quality, satisfaction and future intention among tourists in KNP. We hypothesized that service quality predicts both satisfaction and future intention. Further, future intention was hypothesized to be influenced by satisfaction.

There are several matters worthy of discussion, based on the results. First, the service quality dimensions, which were modified from Brady and Cronin's model (2001), were well representative of service quality in a national park setting. Access to wildlife (service outcome), staff and information (service delivery), and physical facilities (service environment) were three dimensions identified to measure service quality in KNP.

Second, tourists assigned a great deal of importance to service quality to predict satisfaction. Results indicated that the level of satisfaction is based on the tourists' objective evaluation of service quality provided. These findings are comparable to those of previous studies whereby park visitors were more satisfied when park managers assured high quality service (Lee *et al.*, 2004; Chen *et al.*, 2011). In particular, the accessibility to wildlife dimension was the most important predictor of satisfaction among visitors. Since the primary motive to visit the park is to observe scenery and wildlife, park visitors are more satisfied when their motives were fulfilled. Other

service qualities such as staff, information, road conditions or accommodation were also related to visitor satisfaction.

Third, the results showed that service quality was not a pivotal predictor of future intention. Even though the quality of wildlife experience was related to future intention, other service qualities did not directly contribute to visitors' decisions to revisit the park. The results imply that visitor satisfaction may mediate the relationship between service quality and future intention. Additionally, other variables such as social group, weather or images could have contributed to the weak relationship between service quality and future intention.

Finally, satisfaction was the important predictor of future intention. That is, park visitors were more likely to express their willingness to revisit when they were satisfied with their park experience. Even though there was no direct relationship between service quality and future intention, it is obvious that park visitors were more satisfied when they experienced a higher level of service quality. Therefore, park managers should ensure that service attributes are delivered at satisfactory levels to heighten visitor satisfaction and thus increase intention to revisit.

## 6.7 Conclusion

In this chapter, central issues relating to VM – service quality, satisfaction and future intention – were discussed. Those issues included service quality dimensions and measurements in the literature that are applied to nature-based tourism; numerous theories and measurements of visitor satisfaction; the importance of future intention in tourism management; and an empirical study of relationships among service quality, satisfaction and future intention at a national park.

Providing high quality service that enhances visitors' satisfactory experience is a critical responsibility of tourism management. Even the nature-based tourism sectors – where the emphasis was once on protecting and conserving nature and environment – have now shifted their attention to improving services and visitor satisfaction. A greater insight into the factors influencing service quality and satisfaction could provide a key management tool for the responsible authorities; relating to repeat visits, appropriate policy-making decisions, generating revenue for local communities and subsequent public support. Moreover, understanding visitors' future behaviour would be valuable for developing communication strategies, since repeat visitors are more likely to appreciate and develop strong emotional feelings toward the destination and ultimately provide positive referrals to potential visitors. In conclusion, the goal of VM should be to ensure quality of the service, high satisfaction and stronger future intentions that will make the tourism industry more sustainable.

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# 7

## The Relevance of Visitors' National Park Affinity for Effective Visitor Management in Protected Areas

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### 7.1 Introduction

The management of protected areas is often faced with the challenge of fulfilling the objectives of nature conservation while at the same time living up to the expectations of a tourist attraction (Shultis and Way, 2006; Reinius and Fredman, 2007). In addition, traditional holiday and recreation areas are superimposed on many protected areas, particularly in Central Europe. Protected areas are therefore perceived in different ways and are attracting diverse groups of visitors. It can be differentiated between those who visit the region because of its status as a protected area and those who choose the area because of its quality as a holiday and recreation area. It is therefore recommended that socio-economic visitor monitoring for the management of protected areas distinguishes between visitors' affinity-relations. In this way, a differentiated and effective visitor management (VM), giving equal consideration to both the interests of nature conservation and visitor satisfaction, is ensured (Wade and Eagles, 2003; Arabatzis and Grigoroudis, 2010).

This chapter intends to illustrate basic possibilities and limits of segmentation by visitor affinity, within the framework of visitor monitoring in protected areas. For this purpose, different methodological procedures are identified and discussed in order to allow a better comparison between protected areas. Hereupon, guiding strategies for a target group-oriented VM are formulated. The Hohe Tauern National Park, Austria, is used as a case study for empirical research. Modified forms of the procedure are also applicable to other designations, such as UNESCO World Heritage Sites.

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## 7.2 Visitors to National Parks

A wide range of studies across the world has investigated how national parks and protected areas attract visitors and how those visitors could be described and segmented. However, due to different regulations, political parameters or geographical location, results are often not comparable and transferrable. Various approaches also work with different emphases, a fact that makes it even more complex to find similarities.

### 7.2.1 Segmentation approaches

Visitors of protected areas have been the subject of research many times, likewise continuous visitor monitoring is recommended for each protected area by the IUCN (Eagles *et al.*, 2002). Approaches to characterize visitors differ depending on objectives of studies, methodologies and budget for research.

While some studies aim for a general characterization of visitors and their travel behaviour (Schuett *et al.*, 2010; Kruger *et al.*, 2014) or attitudes and behaviours/activities in protected areas (Shultis, 1989; Ormsby *et al.*, 2004; Xu and Fox, 2014), other studies focus on motivations (Van der Merwe and Saayman, 2006; Beh and Bruyere, 2007; Devesa *et al.*, 2010; Hermann, 2013; Kamri and Radam, 2013) and visitor satisfaction (Pan and Ryan, 2007; Okello and Yerian, 2009; Sivalıoğlu and Berköz, 2012; Rodger *et al.*, 2015), including importance-performance analysis and market segmentation (Wade and Eagles, 2003; Arabatzis and Grigoroudis, 2010). Among others, Ryan and Sterling (2001), Hvenegaard (2002), Cochrane (2006) and Marques *et al.* (2010) indicate ways to segment visitors and propose different typologies.

Thus, various studies explain why people visit protected areas. However, only a few focus on the direct link between the designation as a protected area and the reason to visit.

#### *Segmentation by affinity to national parks*

Hence, in the 1990s another approach of segmenting visitors of national parks was introduced in Germany. Arnold *et al.* (1995) asked visitors in different German national parks what role the national park played in their decision to visit the region. Visitors were asked to distinguish if the national park played an important/less important/no role in their travel decision or their decision to make a day trip. They were asked about their knowledge of the area being designated as a national park and if they would still have visited the region without the designation. The results provided information on the awareness of the designation and the induced economic impact. Other authors, namely Erdmann (2005), Erdmann and Stolberg-Schloemer (2007), or Jette *et al.* (2011), followed up on this approach by including questions in their surveys on the correlation between the designation as a national park and travel decisions.

One can argue that holiday travel decisions are different from travel decisions made for day trips. As a consequence, visitors could be uncertain if they should refer to their entire holiday or to their possible day trip to the national park when asked about their travel motivation (Ziener, 2001). Furthermore, K pfer (2000) and Job *et al.* (2003) provided additional and more precise methods, which allow distinction between visitors with a strong national park affinity and those who have less or no



affinity. In the first case, the designation as a protected area is the prime motive to visit the region. K pfer (2000) asked whether the role of the Swiss National Park was a reason for a visit to the area on a four-point scale from ‘dominant role’ to ‘no role’, combined with the question ‘Would you be here, if the national park did not exist: yes or no?’ This approach allows for separation of different kinds of national park tourists, as shown in Table 7.1.

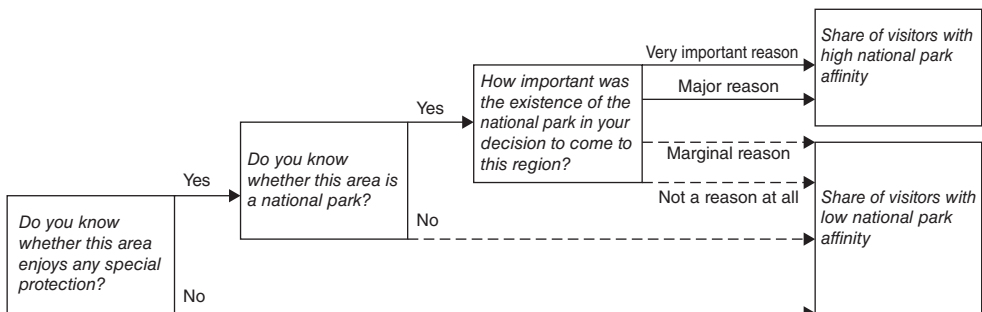
The most common method to segment national park visitors by their affinity has been developed by Job *et al.* (2003). Based on a three-stage question model, he is able to separate those visitors that are not aware of the national park designation and uses this as the first criteria to determine affinity. Furthermore, his approach allows the exclusion of socially desirable responses and the detection of visitors with high affinity proven through knowledge of the conservation category (Fig. 7.1). In 2005 the German Federal Agency for Nature Conservation recommended this approach to detect the economic impact of tourism in large-scale protected areas (Job *et al.*, 2005).

Thus, visitors’ national park affinity indicates the relevance of national park designation in the travel decision process. In contrast to the frequently used term ‘attitude’ towards national parks, ‘affinity’ is not about acceptance of a national park or the conservation idea behind protected areas in general, but about the importance of the designation for travel decisions. Table 7.2 gives an overview of conducted studies relating to visitors’ affinity to national parks.

Knaus and Backhaus (2014) have also compiled a similar overview, focusing not only on national parks but also on other categories of protected areas, such as nature

**Table 7.1.** Decision paths to determine different kinds of national park tourists. (After K pfer, 2000.)

		<b>How important was the existence of the national park in your decision to come to this region? The national park played...</b>			
		no role at all	not an important role	a very important role	the dominant role
<b>Would you be here if the national park did not exist?</b>	No	inconsistent response		national park tourist in the narrow sense	
	Yes	no national park tourist		national park tourist in the broader sense	
	I am not sure				



**Fig. 7.1.** Decision tree to determine visitors with high national park affinity. (After Job *et al.*, 2003.)

**Table 7.2.** Studies estimating visitors' affinity to national parks.

<b>Author and Year</b>	<b>National Park</b>	<b>Approach</b>
Arnold <i>et al.</i> (1995)	Jasmund, Harz, Hochharz (Germany)	own approach
Obua and Harding (1996)	Kibale (Uganda)	own approach
Küpfer (2000)	Swiss National Park (Switzerland)	Küpfer (2000)
Job <i>et al.</i> (2003)	Berchtesgaden (Germany)	Job <i>et al.</i> (2003)
Erdmann (2005)	Eifel (Germany)	own approach
Erdmann and Stolberg-Schloemer (2007)	Eifel (Germany)	own approach
Pöhlmann <i>et al.</i> (2008)	Bavarian Forest (Germany)	Job <i>et al.</i> (2003)
Job (2008)	Berchtesgaden, Mueritz (Germany)	Job <i>et al.</i> (2003)
Job <i>et al.</i> (2008)	Eifel (Germany)	Job <i>et al.</i> (2003)
Müller and Job (2009)	Bavarian Forest (Germany)	Job <i>et al.</i> (2003)
Arnegger (2010)	Souss-Massa (Morocco)	Job <i>et al.</i> (2003)
Mayer <i>et al.</i> (2010)	Bavarian Forest, Eifel, Mueritz, Hainich, Kellerwald-Edersee, Lower Saxon Wadden Sea (Germany)	Job <i>et al.</i> (2003)
Jette <i>et al.</i> (2011)	Joshua Tree (USA)	own approach
Steingrube and Jeschke (2011)	Mueritz (Germany)	Job <i>et al.</i> (2003)
Arnberger <i>et al.</i> (2012)	Gesaeuse (Austria)	Küpfer (2000)
Backhaus <i>et al.</i> (2013)	Swiss National Park and Biosfera Val Müstair (Switzerland)	own approach

parks or UNESCO biosphere reserves. Furthermore, Backhaus *et al.* (2013) developed the most complex approach to distinguish between different kinds of visitors. Based on several 'if-then' conditions, they aimed at determining as precisely as possible the tourism-related economic impact of UNESCO Biosphere Reserve Val Müstair Parc Naziunal, which contains Swiss National Park and Biosfera Val Müstair.

The share of visitors with high affinity towards national parks depends on the survey approach used, on the geographical location and on the history of a conservation or recreation area. Moreover, the general public awareness and perception of national parks has increased in the last two decades. Therefore, results vary considerably, ranging from 7% 'explicit national park visitors' at Gesaeuse National Park in Austria (Arnberger *et al.*, 2012) to up to 75% of visitors whose primary reason for visiting the area was Joshua Tree National Park (Jette *et al.*, 2011). Consequently, results are not comparable due to the above-mentioned reasons. However, it can be noted that the approach of Job *et al.* (2003) is the most commonly used, because it combines visitors' knowledge about conservation patterns with their travel decisions. Furthermore, it is methodically easy to apply while at the same time delivering reliable data. To evaluate the most applicable and accurate approach, several studies with the same framework conditions have to be implemented in the same national park.

Thus far, Eifel National Park in Germany is the only park in which different approaches have been used to estimate visitors' affinity. National Park Eifel was founded

in 2004 and has been used for visitor studies several times. While in the summer/autumn of 2005 Erdmann and Stolberg-Schloemer (2007) found 24.9% of visitors were aware of the designation and stated the designation as the primary reason for visiting, the proportion increased to 35.1% in summer/autumn of 2007. Also in 2007, Job *et al.* (2008) identified 27.3% of visitors with high national park affinity throughout the year. Even though the destination and the year are the same, results are not comparable due to seasonal issues.

Almost all authors have used the knowledge of visitors' affinity to measure the economic impact of national parks or protected areas in general. Particularly in Central Europe, with its high population density and due to the fact that traditional holiday and recreation areas are superimposed on many protected areas, economic arguments for the legitimization of protected areas are common. It is often argued that the tourism-related economic impact of protected areas compensates possible constraints for other economic activities, as well as for all kinds of mass tourism. Furthermore, for the sustainable success of a protected area public acceptance is a crucial factor (Cihar and Stankova, 2006; Haukeland, 2011; Buta *et al.*, 2014; Niedziałkowski *et al.*, 2014; Nastran, 2015).

Müller and Job (2009) and Arnberger *et al.* (2012) also argued that a difference in affinity results in a significant variation of acceptance and satisfaction with management strategies and information policies. Tourists' perception of natural disturbance caused by bark beetle varies significantly in relation to their affinity to Bavarian Forest National Park (Müller and Job, 2009). Arnberger *et al.* (2012) found significant differences relating to visitors' attitudes towards different dimensions and functions of protected area management, such as natural forests, protection of nature, positive impacts for recreation and region, guidance of visitors, environmental education and the need for visitor rules. However, little has been done until now based on that knowledge. Using one Austrian national park as an example, this chapter identifies possible management implications.

## 7.3 Hohe Tauern National Park

Hohe Tauern National Park in Austria was chosen as the object of study, since the Hohe Tauern area has a long tradition as a tourist destination and has had to deal with different perceptions of the area for a long time (Stadel *et al.*, 1996).

### 7.3.1 Study area

The Hohe Tauern National Park was founded in 1981 (province of Carinthia), 1983 (province of Salzburg) and 1991 (province of Tyrol). At 1856 km<sup>2</sup>, it is one of the largest protected areas in Central Europe. By 1971, the provinces of Carinthia, Salzburg and Tyrol had agreed upon the creation of the Hohe Tauern National Park in the so-called 'Heiligenbluter Treaty'. At that time, the communities within the area featured an extremely heterogeneous structure and were consequently also at different stages in the tourism area life cycle.

In this context, the communities of the Salzburg part of the national park should be highlighted. Bad Gastein (2014: 1,120,973 overnight stays) and Kaprun (2014: 871,256 overnight stays) are two of the most important tourist centres in Austria. Neukirchen am Großvenediger (2014: 392,934 overnight stays) and Rauris

(2014: 325,812 overnight stays) are a further two tourist resorts that are able to record a high number of overnight stays. Only Bad Gastein has development that can be traced back to the early ages of modern tourism; the other communities are typical 'products' of the winter tourism boom that began around the 1960s. At least two communities in the Carinthian part of the national park can be counted towards the 150 most important tourist resorts in Austria: namely Heiligenblut (2014: 234,831 overnight stays) and Mallnitz (2014: 131,508 overnight stays). There are no tourist resorts among the Tyrolean part of the national park communities that were of significant importance in a national or international context in the early 1960s. However, during subsequent years, Mauterndorf (2014: 243,251 overnight stays) and Kals (2014: 203,410 overnight stays) have developed into medium-sized tourist resorts.

### 7.3.2 Studies conducted at Hohe Tauern National Park

Since 2003 a total of six studies have been conducted in different parts of the Hohe Tauern National Park (Lehar *et al.*, 2003, 2006, 2007, 2008, 2009, 2013: all unpublished results). Each study aimed at identifying the economic value of the national park combined with different aspects of travel behaviour, motivation and elements of VM. In 2003 a total of 280 visitors, 551 visitors in 2006 and 280 visitors in 2007 were asked about motivations, travel behaviour and expenditure in the Tyrolean part of the national park. A comparable study followed in 2008 on 279 visitors in the Salzburg region. In 2009, again in the Tyrolean part, 824 visitors were additionally asked about their use of or satisfaction with public transport, hiking trails, educational paths and trails, and information points. The last study took place in 2013 on the Carinthian, Salzburg and Tyrolean parts, on a total of 1303 visitors. This study included, besides former items such as motivation, travel behaviour and spending, questions related to educational paths and trails, information points, themes, guest cards, and products offered by the park administration and by partner businesses.

In contrast to the widely used model by Job *et al.* (2003) (Table 7.1), all these studies examined visitors' affinity by taking only one question into account, an approach that follows Erdmann (2005), Erdmann and Stolberg-Schloemer (2007) and Jette *et al.* (2011). It has to be admitted that this method is not as precise as Job's. However, results allow comparison with studies from other national parks, in which affinity was examined with different approaches. Table 7.3 shows the proceeding that has been used in Hohe Tauern National Park to gather data on visitors' affinity.

All studies focused on general attitude towards the Hohe Tauern National Park, as well as the use of and satisfaction with infrastructure and products. Data relating to visitors' affinity were combined with spending behaviour to estimate the tourism-related economic impact of Hohe Tauern National Park, but not for investigating differences regarding VM.

### 7.3.3 Visitors' affinity to Hohe Tauern National Park

In 2008 in the Salzburg part, 34.6% of visitors had strong national park affinity, with another 29.8% having less affinity towards the national park. The most comprehensive

**Table 7.3.** Question to determine visitors with high affinity to Hohe Tauern National Park.

<b>Did the Hohe Tauern National Park play a role when you decided on your holiday destination?</b>		
<b>Response categories</b>		<b>Derived segment</b>
1	<i>Yes, I only chose this destination because it is in the Hohe Tauern National Park Region</i>	Visitors with strong national park affinity
2	<i>Yes, the Hohe Tauern National Park was an additional incentive for me to choose this holiday destination</i>	Visitors with less national park affinity
3	<i>No, the fact that the Hohe Tauern National Park is nearby did not play an important role when choosing my holiday destination</i>	Visitors with no national park affinity
4	<i>No, I started to spend my holidays in this region before the National Park was founded</i>	
5	<i>No, when I chose my holiday resort I did not know that it was located in the National Park Hohe Tauern Region</i>	

study in all three parts in 2013 showed that 20.7% of visitors had strong affinity and 35.2% had less national park affinity. The comparison between the three different regions of the Hohe Tauern National Park in 2013 shows varying results: in Carinthia, 21.3% of visitors had a strong affinity and 32.5% had less affinity; in Tyrol 20% had a strong and 32.2% had less affinity, while in Salzburg only 21% of visitors had a strong and 46.2% had less affinity. A time-series comparison can be provided for the Tyrolean part and is shown in [Table 7.4](#). The share of visitors with no knowledge about the designation as a national park (response category 5 only) declined from 19.0% in 2003 to 3.3% in 2013.

The data were analysed using ANOVA or Chi-squared tests with the statistical programme SPSS, choosing a significance level of  $P < 0.05$ . Due to the large amounts of data, only those results that lead to rewarding implications for VM are presented. The emphasis is on the analysis of the last survey, conducted in 2013, cross-verifications are provided if results differ in tendency from previous studies, or if variables are collected in previous studies only.

#### *Socio-demographics and travel behaviour*

Regarding socio-demographic characteristics such as gender, age or educational background, there are no significant differences between the three groups either in 2013 or in previous surveys. Although the proportion of visitors with an academic degree is much higher than in other tourism destinations in Austria, there are no statistically relevant differences between visitors of Hohe Tauern National Park. The same pattern is observed when it comes to travel behaviour. Results relating to type of transport, length of stay in the region, group size and type of accommodation do not differ in the context of visitors' affinity. Visitors with strong affinity towards the national park are statistically more likely to have half board or no meal arrangement than other groups.

#### *Pricing*

Although visitors do not show statistically different spending behaviour, they do have a diverse perception towards the price/performance ratio of some services ([Table 7.5](#)).

**Table 7.4.** Time-series comparison of visitors' affinity to Tyrolean Hohe Tauern National Park.

	Year of survey and sample of visitors				
	2003 (n=280)	2006 (n=551)	2007 (n=280)	2009 (n=824)	2013 (n=520)
Share of visitors with strong national park affinity ( <i>response category 1</i> )	15.8%	20.4%	21.5%	26.2%	20.0%
Share of visitors with less national park affinity ( <i>response category 2</i> )	34.4%	33.9%	34.6%	22.3%	32.2%
Share of people with no national park affinity ( <i>response categories 3–5</i> )	49.8%	45.7%	43.9%	51.5%	47.8%

**Table 7.5.** Price perception of visitors at Hohe Tauern National Park.

Variables	Visitors with strong national park affinity	Visitors with less national park affinity	Visitors with no national park affinity	Differences
Price/performance ratio: accommodation	2.19	2.45	2.51	0.000
Price/performance ratio: road toll and parking fees	2.52	2.77	2.88	0.007
Price/performance ratio: cable cars	2.90	3.04	3.18	ns
Price/performance ratio: taxis, horse-drawn carriages, other transportation	2.70	2.81	2.89	ns
Price/performance ratio: food and drinks	2.42	2.52	2.64	0.028
Price/performance ratio: services provided by park administration	2.46	2.50	2.83	0.000
Price/performance ratio: guided hikes	2.59	2.64	2.76	ns
Price/performance ratio: overall	2.29	2.51	2.66	0.000

Mean scale from 1, 'very favourable' to 5, 'very unfavourable'; ns, not significant.

Overall, the results suggest a high level of satisfaction with the price/performance ratio of various services at Hohe Tauern National Park, but one could say the higher the affinity towards the park the better the price perception.

### Partnerships

Partnerships between protected area administrations and tourism stakeholders are highly recommended by many authors and institutions to strengthen sustainable development and to increase public acceptance of protected areas (Laing *et al.*, 2008; Wegner *et al.*, 2010; Pfueller *et al.*, 2011; Wyman *et al.*, 2011). While they are widespread in North America and Australia/Oceania, those institutionalized partnerships

are relatively new in Central Europe. It could therefore be seen as surprising that the recently established programme called 'National Park Partner' at Hohe Tauern, which is limited to accommodation and catering, gained such awareness among visitors. More than 40% of all visitors stated that they were familiar with the term, another 23% had at least heard of it, and 34% said that the partnership label played an important role when it came to the booking of accommodation. Results relating to awareness and to importance of the partnerships differ significantly between the groups of visitors, as the higher the affinity the higher the awareness and importance.

#### *Visitor information and use of services*

It is of great interest for the management of protected areas as to how/where visitors gain information on their chosen destination before their trip, as it gives an opportunity to provide useful guidelines about the purpose of the designation. Visitors of Hohe Tauern National Park stated the internet as their most commonly used source (50.7%), followed by relatives/friends (30.2%), other (18.2%), magazines/books (12.2%), tour operators (11.4%), TV (3%), travel agencies (1.7%) and coach tour operators (0.3%). Results between the different types of visitors are not statistically significant.

Within the area of Hohe Tauern National Park, depending on the single regions, several tourist benefit cards are offered by various providers. These guest cards are an opportunity for VM, as they combine information about the area – including Hohe Tauern National Park – with favourable or even free offers for the tourist. The results on the use of these cards vary depending on the regions. While in the Tyrolean part visitors with strong affinity towards the national park use tourist benefits cards significantly more often than both other groups of visitors, results in Carinthia show the exact opposite.

Services offered by the park administration such as guided tours by rangers, educational paths or information centres are proportionally more recognized and used by visitors with strong or at least less affinity, but results are not statistically significant.

#### *Intention for revisit*

Intention for revisit is statistically differentiated according to the groups of visitors. While a high proportion of those with strong or no affinity towards the park reported that they will surely revisit Hohe Tauern National Park (81%), only 68% of visitors with less affinity stated a sure intention to revisit the area. The effect on revisits of controversial plans to expand hydropower and wind energy capacity shows no significant differences between the different kinds of visitors, with 50% and 60% stating that they would still revisit the region despite increased wind energy and hydropower energy capacities, respectively.

## **7.4 Implications for Visitor Management**

Effective VM is one of the decisive factors enabling achievement of the goals of protected areas (Eagles *et al.*, 2002) and the success of tourism destinations (Ritchie and Crouch, 2003). Knowledge of visitor characteristics and tourism demand in general is one of several important aspects for an integrated approach to VM (Sowman and Pearce, 2000). This applies in particular to protected areas that share geographical areas with long-standing tourism destinations, such as can be found in Central Europe.



These findings suggest that more attention should be given to product development in protected areas. This is in line with key success factors for nature-based tourism in protected areas of the Alps as identified by Lintzmeyer and Siegrist (2008). Tourist benefits or guest cards, for example, which offer reduced prices for tourism-related products and services, might be an opportunity to guide different segments of visitors to non-sensitive locations within protected areas.

Furthermore, results suggest adoption of a variety of pricing strategies due to the assorted perceptions of the price/performance ratio by different segments of visitors. Since park administrations are mostly not able to offer the broad range of products and services needed for such pricing strategies, institutionalized partnerships with tourism service providers could help to meet different customers' needs when it comes to pricing and product range. Guidelines for those partnerships have to be developed and implemented in order to ensure appropriate protected area management. This may also help to increase awareness of those partnerships and may additionally lead to increased public acceptance of the protected area due to local participation and direct economic benefits.

All these results influence indirect strategies (Pigram and Jenkins, 2006) of VM. Other authors have reached the same conclusion, recommending educational measures to raise awareness and knowledge of the purpose of protected areas (Müller and Job, 2009), or appropriate tourism marketing strategies and public awareness campaigns targeted selectively at different visitor segments (Arnberger et al., 2012). Therefore, benefits would be gained from conducting studies on direct strategies of VM and their influence on visitors with different forms of affinity towards protected areas.

In summary, for several elements of VM there are some significant differences between visitors regarding their affinity towards protected areas. Therefore, it is recommended that a corresponding monitoring programme is established in order to derive appropriate strategies and tools for effective VM.

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## **Part III    Current Issues in Visitor Management**

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# 8

## Visitor Monitoring in the Tapajós National Forest, Brazil

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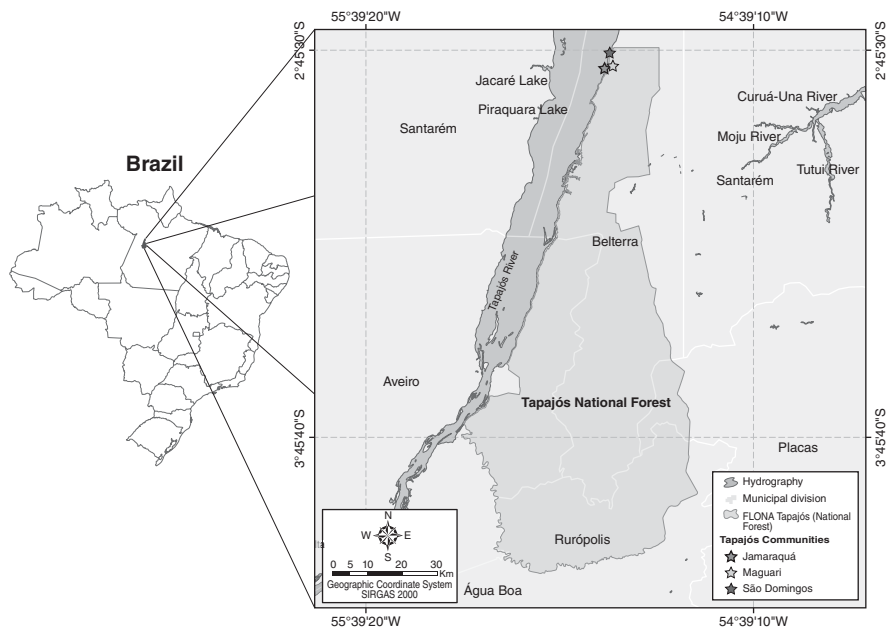
### 8.1 Introduction

The Amazon region of Brazil is still largely undeveloped in non-urban centres, and public use management is a new concept to its forest managers (Burns and Moreira, 2013). It has been well documented that visitation to Brazil's park/protected areas (PPAs) has been increasing over the past several years (Lohmann and Dredge, 2012; WTO, 2013). Further, as a result of the 2014 FIFA World Cup and 2016 Summer Olympics, it is expected that Brazil's influx of tourists will double from just over 5 million in 2010 to over 10 million in 2020 (SMALE, 2011); many of these visitors will visit Brazilian PPAs. In order to provide for the best possible outdoor recreation experience with minimal negative environmental impacts, it is important to understand who visits the forest and what visitors' perceptions are. This chapter covers an in-depth discussion of visitor monitoring in a PPA in the Amazon region of Brazil.

Here we describe a case study undertaken to understand visitor perceptions and develop strategies to avoid potential negative impacts in PPAs. The project aimed to propose best practices in tourism and public use management in selected PPAs managed by the Chico Mendes Biodiversity Conservation Institute (ICMBio), the agency responsible for managing public use in Brazil's protected areas, whether a national park, national forest, or other PPAs. The objective of the visitor monitoring effort was to replicate and extend a US Forest Service monitoring approach; the National Visitor Use Monitoring programme (NVUM). Using a 'best practices' methodology, managers and university researchers developed the first ever *systematic* method of collecting visitor use data in a Brazilian national forest. They collaborated to replicate a data collection process that was similar to that of the NVUM effort, but tailored to meet the needs of a Brazilian national forest.

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**Fig. 8.1.** Map of Tapajós National Forest, Brazil.

The main focus of the study was to understand the perceptions of the Tapajós National Forest visitors, including socio-demographics, motivation and visitor satisfaction. Data were collected between February 2014 and September 2015, resulting in 2267 completed surveys. All data were collected in the communities of Jamaráquá, São Domingos and Maguari (Fig. 8.1). The data collected offer an important source of information to managers so they can understand the best use of the monitoring intervention in the Tapajós National Forest and develop appropriate management strategies.

## 8.2 Tapajós National Forest

The Tapajós National Forest (FLONA Tapajós) lies to the west of Para State in the Amazon region. The FLONA Tapajós was established in 1974 and encompasses the Amazon municipalities of Placas, Rurópolis, Belterra and Aveiro. The FLONA is approximately 527,000 ha, with the Tapajós River on its western border (a tributary of the Amazon) and the BR-163 (Santarém-Cuiabá Highway) to the east. The main gateway to the FLONA is the city of Santarém, a deep water port city on the Tapajós River. At 50 km away, it is the closest urban centre and has an international airport. From Santarém there are two ways to get to the national forest; driving along the BR-163 or navigating along the Tapajós River. There are about 100 miles of river beaches in the protected area.

The FLONA Tapajós is a Federal Protected Area managed by ICMBio and is one of the most highly visited protected areas in the northern region of Brazil. It is also the site of one of the world's most foremost sustainable community tropical forest management programmes. It hosts socially and culturally rich communities, including

500 indigenous people from the Munduruku ethnicity divided into three villages – Bragança, Marituba and Takuara. In addition, there are over 4000 traditional dwellers who live in 25 communities throughout the region (ICMBIO, 2015). The goals of the FLONA involve sustainable multiple use of forest resources and scientific research, with emphasis on developing methods for the sustainable use of native forests. Like most ICMBio Protected Areas, the FLONA has a management plan (IBAMA, 2004). The FLONA management plan allows for recreation activities as outdoor recreation has always been a part of the history of the FLONA. Despite this, tourism and outdoor recreation have been truly important only since 1993 when the FLONA began requiring visitors to obtain permits, charging access fees, managing recreational activities and regulating guided tours. In 1994 ecotourism was first planned for in the FLONA; it developed after an assessment study regarding the tourist potential of the area (BRASIL, 2004).

There are many traditional communities within the FLONA; this study focuses on three relatively highly visited communities: São Domingos, Maguary and Jamaraquá. They were selected for several reasons: they are closest to the city of Santarém; are easily accessed via road or river and receive a large proportion of visitation by national and foreign visitors; and the area also represents a sample of the typical Amazonian lifestyle, with preserved primary forests, huge trees, igarapé streams, a river, wildlife and riverine culture.

The three communities are located in a corridor setting and are situated within the gated secure area of the FLONA. They are managed as a ‘cluster’ of high use sites within the corridor. New information and interpretation signs were developed and installed in 2014, as part of a partnership between the US Agency for International Development (USAID), US Forest International Programs (USFS-IP) and ICMBio. Relevant community information, such as the names of the communities and historical information – all developed by local artisans – provide tourists with important contextual information.

From the north, the first community along the corridor is São Domingos. Its attractions are the fine white freshwater beach during the summer, the ‘Curupira’ trail and open access to walk through a typical Amazon community (with opportunity to visit family flour mills, taste local fruits and meet locals). The next community is Maguary; it is very much known for its beautiful beach Ponta do Maguary. Another popular attraction here is the Sumauma tree trail (known locally as the granny Sumauma), a 9 km hike in which visitors have access to one of the oldest trees in the region. The Sumauma tree has a circumference of 45 m and a group of 25 people cannot embrace it by holding hands. Local craft products can also be bought in this community. The third community, located about 5 km from Maguary, is Jamaraquá. It is also known for its beautiful beach and trails, and visitors can go on canoe trips through the igarapé streams. Latex works are sold in this community, as well as straw crafts and biojewellery.

The scenic beauty of the FLONA can be appreciated both during the high-water season (February to August) and during the dry season (September to January). During the Amazonian winter, the rain is more frequent, but the heat and high humidity are still very present; the beaches are underwater, but one can go hiking along the trails, take canoe trips through the igarapés, watch wildlife, and take a stroll in the communities to learn about the local culture and buy crafts. In the summer, the main attractions are the river beaches and bathing in the Tapajós River. It is possible

to stay overnight in all three communities. Tourism takes place with little structure; facilities are simple and are usually an extension of the residents' houses, who offer a bed (in hammocks) and breakfast service. Currently, tourism only benefits those who start their own business; there is little government influence or incentive for the government to become involved.

### 8.3 Methods

Survey questionnaires were applied using electronic tablets (e-tablets) and online software. The e-tablet technology allows for real-time uploading of data to an information cloud that can be accessed at any time by researchers or resource managers. Data were systematically collected at selected locations within the three local communities over a period of 25 days per month between February 2014 and September 2015. Participants were selected through non-probabilistic sampling according to Mattar (1996). Visitors were selected to participate in the survey if they were available when the interviewer was passing through the community. A total of 2267 questionnaires were analysed to provide the data for this chapter. The questionnaires took 5–10 minutes to be answered and included both closed and open-ended questions. Data were downloaded into a statistical package for analysis.

In the case of FLONA Tapajós, the overall methodology also involved conducting a literature review and field research, as well as the following steps:

1. Preparation of a work plan, detailing field data collection.
2. Development of data collection instruments, replicated and extended from questionnaires applied at US National Forests.
3. Data collection through questionnaires in the communities of Maguary, São Domingos and Jamaraguá.
4. Development of a database, data analysis and interpretation.
5. Development of a final project report.

The survey questionnaires made use of various Likert scales to measure desires/expectations, motivations, trip experience levels and crowding/conflict levels for visitors. As mentioned previously, the questions were effectively applied previously in the USA and were revised for use in Brazilian PPAs. Results of the surveys were used for critical management decisions. Using the existing research instruments was part of a simplified process where questionnaires need only be changed to suit specific needs and translated into Portuguese to be administered.

Once collected, the data were entered into the statistical analysis program. To allow ICMBio resource managers to have access to the data, the databases are housed and maintained by faculty members from two partner universities (the Ponta Grossa State University and West Virginia University), as well as by ICMBio. All data are available to the partners and ICMBio, which may encourage resource managers to make use of existing data in making future management decisions. The details of the research effort were annotated and registered with ICMBio headquarters in Brasília, as required by the Brazilian federal government. The registration (SISBIO) indicated where the data collection took place and noted that the team included collaborators from ICMBio, university faculty, students and local community members.

The methodology was co-designed by university visitor use management experts, ICMBio and the USFS-IP staff members. An important consideration in developing the visitor monitoring system was how exactly to do this. In this case, the study was modelled after the USFS's NVUM programme, the only method that the USFS use to understand visitor use. It originated in 2000 and has been successfully implemented in all USFS forests over a period of 15 years (USFS, 2015). The NVUM surveys are administered in each national forest every 5 years, meaning there have been a minimum of three data collection efforts, each lasting 1 year, for the past 15 years.

The US-based NVUM protocol involves on-site, face-to-face interviews at exit points from the recreation areas. Visitors are queried about what recreation activities they participate in, how much they spend on their recreation trips, their crowding and satisfaction levels, trip motivations and trip characteristics. Over the past 15 years more than 250,000 recreation interviews have been completed using the NVUM protocol. Interviews take place in randomly selected recreation areas, such as day use areas, overnight areas, general forested areas and wilderness. As the main focus of the Brazil study was to develop a visitor use profile and understand the visitors' perceptions of FLONA Tapajós, questions were asked regarding social-demographics, trip characteristics, as well as the perception, motivations and satisfaction related to their leisure experiences in the FLONA. For the purpose of comparing with the data already collected in the USA, questions were also asked relating to perception of crowding and full capacity in certain spots.

This project team provided general leadership and technical assistance at a local level. Team members participated in many planning meetings at the FLONA and in the local communities to foster support from local community members, including COOMFLONA (Joint Cooperative of the FLONA Tapajós).

## 8.4 Results and Discussion

Visitor and trip characteristics are important in understanding when visitor management is the priority of a research and planning effort. A visitor profile of FLONA visitors was therefore developed, which will be discussed in detail below.

Visitors' gender distribution at the FLONA was about half female, half male. This counters what we typically see in European and US settings where a ratio of about 30% female is seen in field-based surveys. [Table 8.1](#) shows that the average age of the respondents is about 37 years. Closer observation of the same table shows that the age of the respondents is skewed toward the younger age range. In reality, most of the respondents are in the age range of 21–50, and nearly two-thirds of them are between the ages of 21 and 40. Very few visitors were over the age of 70 years or less than 20 years old. Thus, it is possible that the visitors are, for the most part, active young adults who seek similar experiences to others in their age group.

Understanding variables such as gender and the average age of visitors is important to managers because they can adjust facilities, services, information and even the recreation experience to a target audience (Burns and Kainzinger, 2014; Burns *et al.*, 2014a, b). This example highlights the need to look closely at visitor monitoring data in order to make management or marketing decisions.

**Table 8.1.** Demographics of participants in FLONA Tapajós questionnaire.

	Frequency	Valid %
<b>Visitor age (years)</b>		
16–20	120	5.4
21–30	758	33.5
31–40	649	28.7
41–50	309	13.7
51–60	245	10.8
61–70	132	5.8
≥71	48	2.1
	Mean age (years) = 37.33	
<b>Visitor gender</b>		
Male	1076	47.5
Female	1184	52.2

Table 8.2 shows that about two-thirds of the respondents are from Brazil and the remainder come from France, the USA, Italy and Germany. This presents a challenge for the managers of the FLONA. With so many visitors coming from outside of Brazil, it may be advantageous for local tourism and outdoor recreation providers to speak English or Spanish. This would facilitate conversation and thus provide non-Brazilian visitors with a better experience. However, virtually no outdoor recreation or tourism providers in the FLONA speak a language other than Brazilian Portuguese. It is interesting to note that very few of the non-Brazilian visitors are from South American, Central American or Asian nations. This information can help local providers to develop appropriate recreation and tourism packages and may suggest what types of food or drink may be more marketable.

Trip characteristics are also important visitor monitor variables (Table 8.3). This study shows that the vast majority of respondents (86.7%) to the FLONA were first-time visitors. This also contradicts the findings of a plethora of studies outside of Brazil, where the proportion of first-time visitors is only about 15–20%. This finding may have important implications for managers. First-time visitors tend to rely on information to a greater degree than repeat visitors; they also need different types of information. Such information can be tailored to first-time visitors as FLONA resource managers update their management planning efforts.

Information on whether the visitors tend to stay overnight or are merely day-trippers is also important to managers. On the Tapajós, over two-thirds (68.7%) of the visitors interviewed at the FLONA were day visitors (Table 8.4). Their time is limited as they must travel from home or a hotel, participate in their chosen recreation experience and then travel back home or to their hotel. The visitor monitoring data also shows that over half of day visitors spent at least 7 h on the trip and that the average length of day trip was 6.5 h. Day users typically prefer a streamlined transportation method that allows them to begin their recreation experience as soon as possible, followed by a fast trip home. In addition, the length of stay is relatively long (day visitors in the USA and Europe tend to stay in parks for about

**Table 8.2.** International visitors to FLONA Tapajós by country.

	Frequency	Valid %
<b>International visitor</b>		
Yes	770	34.0
No	1494	65.9
<b>Country</b>		
France	145	19.0
United States	111	14.5
Italy	83	10.8
Germany	70	9.2
Spain	56	7.3
United Kingdom	50	6.5
Canada	34	4.4
Other countries	221	28.7

**Table 8.3.** Trip characteristics.

	Frequency	Valid %
<b>First visit to the National Forest Tapajós</b>		
Yes	1965	86.7
No	302	13.3

4 h). One of the implications of the long stay is the need for provision of water and food. Are food and water available? What types of food offerings are most appropriate? Understanding the demographic makeup of visitors can help managers answer these types of questions.

The average length of stay of the 31.3% of visitors who overnights was nearly 3 days. Nearly half of the repeat visitors spent 2 days or less at Tapajós per year. This suggests that the market niche for the FLONA Tapajós is that of ‘weekend visitors’, it does not appear to develop into a long-stay destination. This has potential implications for local lodging operators and on-site lodging. Lodging operators can focus their marketing efforts on weekend stays, rather than trying to market longer tours, leading to increased efficiency and additional revenue.

Understanding why visitors wanted to come to a specific recreation area or what motivated them to spend their time and money to visit is important to all resource managers. In the FLONA case study (Table 8.5) the greatest proportion of respondents (44.5%) reported ‘I enjoy nature’ as the most important reason for visiting. Nearly one-third chose the item ‘It’s a good place to experience the culture of this area’ as the most important reason, while just a few visitors visited primarily because ‘It’s close to home’. These responses are similar to what has been recorded in other similar settings (with the exception being ‘It’s close to home’).

In any visitor monitoring effort, a series of questions should be asked about visitors’ recreation experiences. Understanding the visitor experience is one of the



**Table 8.4.** Trip characteristics.

	Frequency	Valid %
<b>Type of visit</b>		
Overnight	700	31.3
Day	1534	68.7
<b>How many days (or hours) long is your trip?</b>		
Days		
1-2	513	73.5
3	99	14.2
4	28	4.0
5-6	25	3.6
≥7	33	4.7
	Mean no. of days = 2.76	
Hours		
1-2	138	9.0
3	88	5.7
4	149	9.7
5-6	343	22.4
≥7	814	53.1
	Mean no. of hours = 6.50	

**Table 8.5.** Most important reason to visit FLONA Tapajós.

Reason	Frequency	Valid %
I enjoy nature	1007	44.5
It's a good place to experience the culture of this area	729	32.2
I like the place itself	175	7.7
It's a good place to do the outdoor activities that I like	161	7.1
I want to spend more time with my friends	121	5.3
It's close to home	70	3.1

primary reasons for monitoring visitors. While there are many ways of doing this, this chapter focuses on the concept of visitor experience evaluation, measuring variables such as trip satisfaction, crowding and conflict.

Trip satisfaction was evaluated through the use of numerical (Likert) scales (Table 8.6). Previous research suggests that in addition to using Likert scales, existing literature and evaluative indicators from other similar settings can help understand visitor satisfaction. In this case, a 5-point Likert scale (where 1 refers to the worst possible experience of service quality and 5 to the best) was used. 'Safety and security' was given the highest rating (mean=4.26), with 45.3% of visitors rating this domain as 'excellent', and the lowest rating given was for 'access roads' (mean=3.81) with 11.8% saying that

**Table 8.6.** Quality domains.

Item	Rating (Likert scale)						Mean rating
	Poor (1)	Fair (2)	Good (3)	Very good (4)	Excellent (5)	Not applicable	
	Percent						
Cleanliness of area	3.1	5.0	24.8	33.6	33.5	1.5	3.89
Safety and security	<1	2.7	12.3	39.3	45.3	1.9	4.26
Trail condition	<1	5.9	18.1	31.9	43.7	13.6	4.13
Condition of facilities	4.1	6.0	20.7	39.6	29.7	5.6	3.85
Access roads	2.3	9.5	22.5	36.4	29.4	5.5	3.81

Percentages may not equal 100 because of rounding.

**Table 8.7.** Overall visitor satisfaction with FLONA Tapajós.

Rating (Likert scale)						Mean rating
Poor (1)	Fair (2)	Good (3)	Very good (4)	Excellent (5)	Perfect (6)	
%						
1.0	2.8	7.2	21.4	43.4	24.2	4.76

quality was either ‘fair’ or ‘poor’. In contrast, two-thirds of visitors rated ‘cleanliness of area’ (67.1%) and ‘condition of facilities’ (69.3%) as ‘very good’ or ‘excellent’.

In addition to the service quality items, a global measure of overall trip experience was used to understand how satisfied visitors were on their trip (Table 8.7). Using a scale of 1 to 6 (where 1 refers to least satisfied and 6 to perfectly satisfied), the largest proportion of visitors (43.4%) rated their overall satisfaction with the FLONA as ‘excellent’, with a mean rating of 4.76. At first glance, this satisfaction rating appears high, but an examination of previous satisfaction and service quality literature shows that it is similar to what has been recorded for other comparable settings. Satisfaction is typically rated highly by recreationists and tourists because they choose to visit; they want to be there and if they were unhappy they would go somewhere else.

## 8.5 Conclusions

### 8.5.1 The case study

Recent increases in tourist visitation to Brazilian PPAs have resulted in greater attention being given to visitor monitoring; a case study of visitor monitoring in the Tapajós National Forest has been the focus of this chapter. The results of the case study offer important information to PPA and tourism managers, and may be used to support planning and management strategies. It is expected that this project will

serve as a model for ICMBio, with creation of a database of visitors' perceptions as well as the conduct of similar systematic data collection processes in its other PPAs.

As the visitor experience is typically examined through the paradigm of outdoor recreation crowding and conflict, it was interesting to note that crowding and conflict in the FLONA differ significantly from previously conducted research efforts outside of Brazil. FLONA visitors were not at all disturbed by the density of people at a setting, contrary to what is typically seen. In fact, when asked about the impact of the presence of other people, nearly two-thirds of visitors reported positive impacts ('I enjoyed having other people around'). Only a small percentage (3%) reported some type of negative impact, stating that they would prefer fewer people. Of the few negative impacts reported, the primary causes were most often 'residents', 'people on trails' and 'motorcyclists'. In addition, the vast majority of visitors (98.0%) did not encounter areas of congestion while in the FLONA.

Resource managers often express frustration with visitors not understanding that they are in a specific type of park. For example, in an area where there are many different park and protected area types (such as a state park connected to a federal protected area for example), people generally do not know who manages the park. In the FLONA, however, most of the visitors (81%) were aware it was a Brazilian National Forest. Previous research has shown the opposite in parks in the USA, with only about 20% of visitors being aware of what agency manages the park. At the FLONA, awareness is broadened by the information available in signs, folders and websites. Also, most visitors come by car or bus. Each vehicle needs to enter the forest through a gate, and each gate has new signs, which inform visitors they are entering a protected area.

### 8.5.2 Implications for benchmarking and best practices

When conducting an analysis of PPA visitor use, it is important to realize that others around the world are most likely dealing with similar issues. Whether the issues relate to satisfaction, recreation conflict, or resource issues such as trail conditions, another manager in another PPA has dealt with it. This chapter is intended to provide one method of best practice in PPA management. Many PPA managers simply do not have the funds to implement and conduct a visitor use survey such as the one discussed in this chapter. Accordingly, this case study is designed to provide the reader with an example of best practice in visitor use monitoring. Although there are many ways of dealing with resource and social issues in PPAs, if a manager cannot conduct a study they can conduct a literature review to understand how others have dealt with similar situations in similar settings (von Ruschkowski, *et al.*, 2013).

For example, this Brazil case study shows that visitors stay much longer than is seen in US PPAs. Knowing this information can provide the manager with insight about what is different in their PPA. If the average length of time a visitor spends in US PPAs is 4 h, and in a Brazil park it is 7 h, the manager may have many different options to consider, such as whether food services and lodging are necessary, or whether there are sufficient water sources. A visitor use monitoring study can provide such information if it is possible to conduct it, but if not, previous visitor use monitoring studies can be a valuable source of information that may allow the resource manager to make do.

Finally, PPA resource managers should think deeply about the implications of the findings from any visitor use monitoring study. The implications can be wide-ranging

and require much thought before they are used to implement changes. Simply being aware of the average number of campers that visit a PPA will probably not be sufficient (e.g. Shafer, 1969). Resource managers should consider the uniqueness of their PPA. They should consider how spatial and temporal variables impact their area. For example, there may be a high amount of use at a specific trailhead or park setting on high use days, such as weekends and holidays. The manager must take this type of information into consideration when using data to make decisions about public use. Used wisely, visitor use monitoring results can be an invaluable management tool.

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# 9

## Tourist Behaviour, Vandalism and Stakeholder Responses

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### 9.1 Introduction

A substantial body of literature in tourism reveals that the behaviour of tourists can have negative effects on both the host community and the environment (for an extended discussion see Singh *et al.*, 2003; Leslie, 2012; Holden and Fennell, 2013). Nevertheless, it is prudent not to see these impacts as uniform or inevitable. Tourists differ in their value systems. Some have a high regard for local cultures and the visited environment and want to protect and conserve these resources (Bramwell and Lane, 2009; Saarinen, 2014). By way of contrast, others are indifferent to their socio-cultural and biophysical settings (Fennell, 2007; Nepal and Lu, 2009). It is apparent, however, that both malicious and unintentional behaviour may have negative impacts on the visited locations (Pearce, 2011, 2013).

The interest in this chapter lies in the views of site managers and government stakeholders towards environmental damage at tourist attraction sites. At times, the term vandalism is apposite but needs to be carefully defined to avoid ambiguities and misinterpretation. The first section of the chapter clarifies the meaning of the term vandalism in a tourism context, provides a condensed literature review of the costs involved, and discusses the importance of considering a diversity of stakeholder views in managing the outcomes. The main part of the chapter provides empirical data from a South-East Asian context, addressing the way stakeholders view and seek to manage environmental impacts at attractions. Both the seriousness of the problem and methods for controlling environmental site damage are considered. Stakeholders at a total of 22 sites in Singapore and Bangkok were sampled as part of the framework for the research effort. A concluding section of the chapter draws broader and generic conclusions about limiting site damage at such tourist features.

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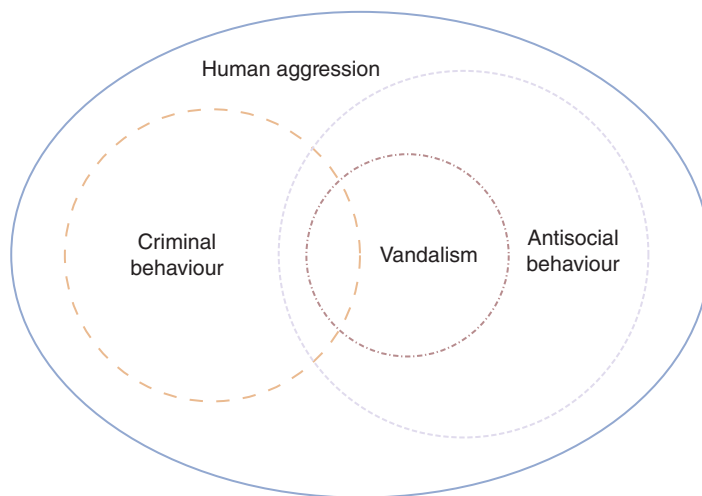
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## 9.2 Environmental Damage in the Context of Tourists

### 9.2.1 Definition of vandalism and environmental damage

Studies of human aggression including vandalism towards settings have been conducted mostly in recreation and leisure, criminology, psychology and sociology (Ballatore, 2014). For example, psychologists Bushman and Anderson (2002, p. 28) argue that ‘human aggression is any behaviour directed towards another member of a community or their property that is carried out with the intent to cause harm or damage’. The Venn diagram in Fig. 9.1 is useful in outlining the domain of human aggression and associated subordinate concepts. Here, three themed topics are represented as a part of the broader concept of human aggression; the key concepts are criminal behaviour, antisocial behaviour and vandalism. Within the figure, further clarity is provided by identifying vandalism as principally a subset of antisocial behaviour, which overlaps only partly with criminal behaviour. While intentionality is necessary in framing the topic of vandalism, some forms of damage may simply arise due to overuse or unskilled use of a facility (Newsome *et al.*, 2002). It is acknowledged that the stakeholder views with which we are concerned in this chapter may include both the perception of willful and unintentional damage.

The precise definition of vandalism in this chapter builds on the descriptions of wanton vandalism (Martin, 1961); vandalism of overuse, leverage vandalism and deleterious vandalism (Weinmayer, 1969); play vandalism and malicious vandalism (Cohen, 1973); misnamed vandalism and hidden maintenance vandalism (Zeisel, 1977); and peer pressure vandalism (Coffield, 1991). Some key points in these approaches include an emphasis on aggressive and antisocial behaviour, acts of property damage and losses to society. The following definition is central to the use of the term vandalism in this chapter: ‘Vandalism is as an act of intended human aggression that is effectively antisocial, which while not necessarily invoking criminal charges, does result in damage to or loss of property’.



**Fig. 9.1.** Typology of human aggression and vandalism; a specific view.

Additionally, the full approach to environmental damage employed here follows the convenient tactic of considering all deleterious environmental and resource effects arising from tourism uses of the setting. This ambit of concern includes vandalism but our interest extends beyond that term to include unintentionally destructive behaviour. Garrod (2003), for example, considers the case of damage to the paintings in Nefertiti's tomb near Luxor in Egypt. The simple act of tourists breathing on the ancient painted surfaces is an unintentional but damaging behaviour. In the researchers' view this is not vandalism, but the importance of managing the human presence in these kinds of cases is also pressing.

### 9.2.2 Key contextual literature

Vandalism, as defined above, results in property damage and destruction. These outcomes encompass irreversible consequences (breaking and defacing), reversible effects (litter and misuse of facilities), immediate impacts (graffiti), delayed outcomes (environment degradation) and covert damage (such as in underwater marine/natural environments). Further, vandalism has both explicit and implicit costs. While most of the above outcomes will result in explicit costs, the loss of cultural heritage and social values are subtle and have implicit costs. In the context of tourism, monetary, socio-cultural, economic and environmental burdens of vandalism and unintentional environmental damage can be explored using the available literature.

Assessing the economic costs of tourist site damage is difficult. Several studies in school settings have estimated that over 50% of infrastructure budget allocations are allocated to the repair and restoration of damaged property (Tygart, 1988; Fritzon *et al.*, 2001; Almond *et al.*, 2005). In the absence of a similar study in tourism, it can be suggested that there are parallel explicit costs of labour and material, and the supervision of the repair process. Destruction of irreplaceable property, loss of aesthetic value during repair, and lost income during downtime are, arguably, some of the hidden costs of property damage.

Several studies have directed attention to the socio-cultural issues surrounding vandalism. These include the stress-enhancing effects of vandalism (LaGrange and Ferraro, 1992), increased incidence of incivility (Miethe and Meier, 1994), and a sense of disorder and decline due to litter and associated damage to public facilities (Skogan, 2011). It has also been argued that existing damage results in further damage due to a lowering of the inhibition levels of visitors (Christensen *et al.*, 1992). Similarly, the cultural cost in the form of the irreplaceable loss of valuable property, loss of future assets and reduced visitor numbers are socio-cultural consequences for an affected community. Furthermore, the community may be forced to bear higher costs in the form of additional police patrols and site maintenance (Thirumaran, 2013).

The cost of removing litter, the burden of replacing chopped or mutilated plants or trees, the expense of replanting destroyed gardens and the further imposition of treating water pollution are a few of the environmental costs associated with vandalism. These costs are, however, relatively minor when compared to the total scale of environmental impact due to tourist activity (Brown and Devlin, 2003). On this larger scale of consideration, the abundant use of energy and transport by tourists may be felt in the form of climate change and loss of environmental amenity (Jenkins and Schröder, 2013; Mayer, 2014). Such broad-scale impacts may in turn produce



specific impacts on the resource such as the deleterious effects of pollution on heritage buildings. The arguments that pervade the concern about all forms of environmental damage are that such effects will reduce the appeal of attractions and in turn lower the positive economic benefits of the sector. Nevertheless, it is difficult to pinpoint the precise impact level of tourist-linked environmental damage. Drawing on the discussion, a key goal of the present study will be to at least access stakeholders' views of the significance of localized environmental damage from tourism.

### 9.2.3 Importance of a multiple stakeholder perspective

Consideration of a variety of stakeholder perspectives is increasingly recognized as an important factor in tourism studies (Gössling *et al.*, 2009; Hall and Winlow, 2012). Many researchers agree that stakeholders are a significant component of an organization's environment (Freeman, 1984; Jawahar and McLaughlin, 2001; Fyall, 2008). Murphy (1985), in his seminal work *Tourism: a Community Approach*, emphasized the importance of creating links with stakeholders and developing mutually beneficial partnerships (Bramwell and Sharman, 2000; Hall, 2007). Additionally, analyses of the competitiveness of destinations frequently stress the value of understanding stakeholder involvement and voices (Mazanec *et al.*, 2007; Crouch, 2011). Nevertheless, limited attention has been given to studying multiple stakeholders in tourism research (Dodds, 2007; Byrd *et al.*, 2009). The empirical findings reported in this chapter focus on two groups of stakeholders, namely the local government officers and the attraction site managers. These groups were selected for research attention because of their pivotal roles in managing on-site environmental damage.

## 9.3 Specific Study

### 9.3.1 Aims

The following study is guided by two research questions: (i) What is the perception of site managers and local government officers regarding the seriousness of property damage (including vandalism) at visitor attractions? (ii) What are the site managers' and local government officers' responses to property damage at visitor attractions? The questions are considered in the context of Bangkok and Singapore, two South-East Asian cities where the numbers of international tourists in each location exceeds 15 million annually (UNWTO, 2014). The findings from this specific work in two important Asian tourist settings will then be used to consider the wider ambit of addressing environmental damage at tourist attraction sites.

### 9.3.2 Methods

#### *Data collection*

The study employed semi-structured interviews as the main instrument for data collection. This methodology provides the interviewer with a general plan of enquiry based on a set of topics that can be discussed in depth (Babbie, 2010; Lincoln *et al.*,

2011). The selection of site managers and government officials was linked to their role in controlling and influencing tourist behaviour at a comprehensive listing of key sites in the two cities. The selection of these sites followed a structured identification process. In order to establish the popularity of the sites, publicly available website sources making recommendations to visitors were identified. Four kinds of sources were identified: the official source of tourism-related information, popular tourism reference books, key regional travel websites and well-known global travel web sources. A website for each type of source was selected for Singapore and Bangkok, respectively. Table 9.1 lists the web sources employed to identify the sites for the study.

The selected site had to:

- Attract visitors and offer a specific 'type of activity' as listed in Table 9.1.
- Meet the previously stated criterion of an attraction and should be recommended as a visitor attraction by popular and reliable web sources.
- Be recommended by all four sources as a popular visitor attraction.

Table 9.2 identifies the sites that were selected. An important step in the exercise was to ensure comparability of attractions (sites) in Singapore and Bangkok in order to arrive at a comprehensive coverage of sites in these cities.

**Table 9.1.** Online sources referred to while selecting visitor attraction sites.

	Singapore	Bangkok
Official tourism information	Singapore Tourism Board ( <a href="http://www.stb.gov.sg">www.stb.gov.sg</a> )	Tourism Authority of Thailand ( <a href="http://www.tourismthailand.org">www.tourismthailand.org</a> )
Popular tourism reference	Lonely Planet Singapore ( <a href="http://www.lonelyplanet.com/singapore">www.lonelyplanet.com/singapore</a> )	Lonely Planet Thailand ( <a href="http://www.lonelyplanet.com/thailand">www.lonelyplanet.com/thailand</a> )
Popular regional travel website	<a href="http://www.Zuji.com.sg">www.Zuji.com.sg</a>	<a href="http://www.Sawadee.com">www.Sawadee.com</a>
Popular global travel web source	<a href="http://www.tripadvisor.co.uk/">www.tripadvisor.co.uk/</a>	<a href="http://www.tripadvisor.co.uk/">www.tripadvisor.co.uk/</a>

**Table 9.2.** List of visitor attraction sites in Singapore and Bangkok.

	Singapore	Bangkok
Nature reserve/marine reserve	Botanical garden	Lumpini Park
Watersports	Sentosa Beach (Siloso)	Chao Phraya River
Scenic landmark	Marina Bay Precinct	Grand Palace
Excursion tour to city centre	Orchard Road	Pratumwan city area
Visit place of worship	Sri Marriamma Temple	Temple of Reclining Buddha
Local community/market	China Town	China Town
Sample local food/dining out	Clark Quay	Khaosan Road
Shopping	Takashimaya Mall	Siam Paragon
Amusement/theme park	Wild Wild Wet	Siam Park City
Galleries/museum	Asian Civilization Museum	Jim Thompson House Museum
National park/wildlife conserve	Singapore Zoo	Dusit Zoo

Site managers and government officials responsible for the day-to-day management and operations of the selected tourist attractions constituted the respondents in this study. Twenty-six interviews, 14 in Bangkok and 12 in Singapore, were conducted by the research team with the assistance of a translator in Bangkok. The list of potential questions in English, the invitation letter to participate in the interview and the consent form were mailed to an academic researcher in Thailand for translation into Thai language. The interview questions in Thai were translated back into English language by another academic at an institute of higher learning in Thailand. The back-translated questions and the original questions were compared for matching content. Minor revisions were made by a joint committee comprising the two academics from Thailand and the research team.

### *Data analysis*

The data were analysed using Leximancer text analytics software (Leximancer, 2013). In Leximancer, the expression 'concept' is a synthesis of a text representation. It is built on keywords, synonyms and stems. The term 'concept' represents a meaningful entity rather than simply being the repetition of conjunctions and definite and indefinite articles (Wu *et al.*, 2014). Concepts and their relationships form the foundations for extracting meaning from a text. A collection of concepts is displayed on a graphical map in the form of coloured representative circles called themes. The combination of themes and related concepts assist in analysing the texts as the process builds from analysing words to identifying commonalities, with the further possibility of offering insights.

## **9.3.3 Results**

The presentation of the research results follows the research questions. Each question is analysed with the assistance of a concept map. Concept maps were produced to reveal the most common themes and concepts found in the interview transcriptions. The concept map is supported by data on the frequency of occurrence and co-occurrences of concepts.

*What is the perception of site managers and local government officers regarding seriousness of property damage (vandalism) at visitor attractions?*

This section evaluated whether various stakeholder groups had different attitudes about property damage. Figure 9.2 maps four stakeholder groups, namely: (i) Singapore government officers (SGO), representing attitudes of officials employed in Singapore government agencies responsible for visitor attractions in Singapore; (ii) Singapore site managers (SSM), representing attitudes of site managers involved in management of visitor attractions in Singapore; (iii) Bangkok government officers (BGO), representing attitudes of officials employed in Thailand government agencies responsible for visitor attractions in Bangkok; and (iv) Bangkok site managers (BSM), representing attitudes of site managers involved in management of visitor attractions in Bangkok.

The attitudes of these four stakeholder groups were recorded under two options: 'Serious problem', wherein the interviewee believed that property damage at visitor attractions is a serious problem and 'Not a problem', wherein the interviewee believed

that property damage at visitor attractions is not a serious problem. Additionally, the links between the four stakeholder groups and the basic themes of the interviews as well as the seriousness of the issue are portrayed in the Leximancer derived maps. In this first analysis (Fig. 9.2), seven key themes are identified in the concept map: damage, attraction, environment, guards, safety, heritage and outcome. Data analysis confirms that the four stakeholder groups maintained different attitudes about property damage.

Close scrutiny of Fig. 9.2 reveals that particular concepts and themes are more closely related to specific stakeholder groups. The stakeholder groups varied in their attitude about seriousness of property damage as a problem at visitor attractions. For example, the SSM group did not consider property damage as a problem at visitor

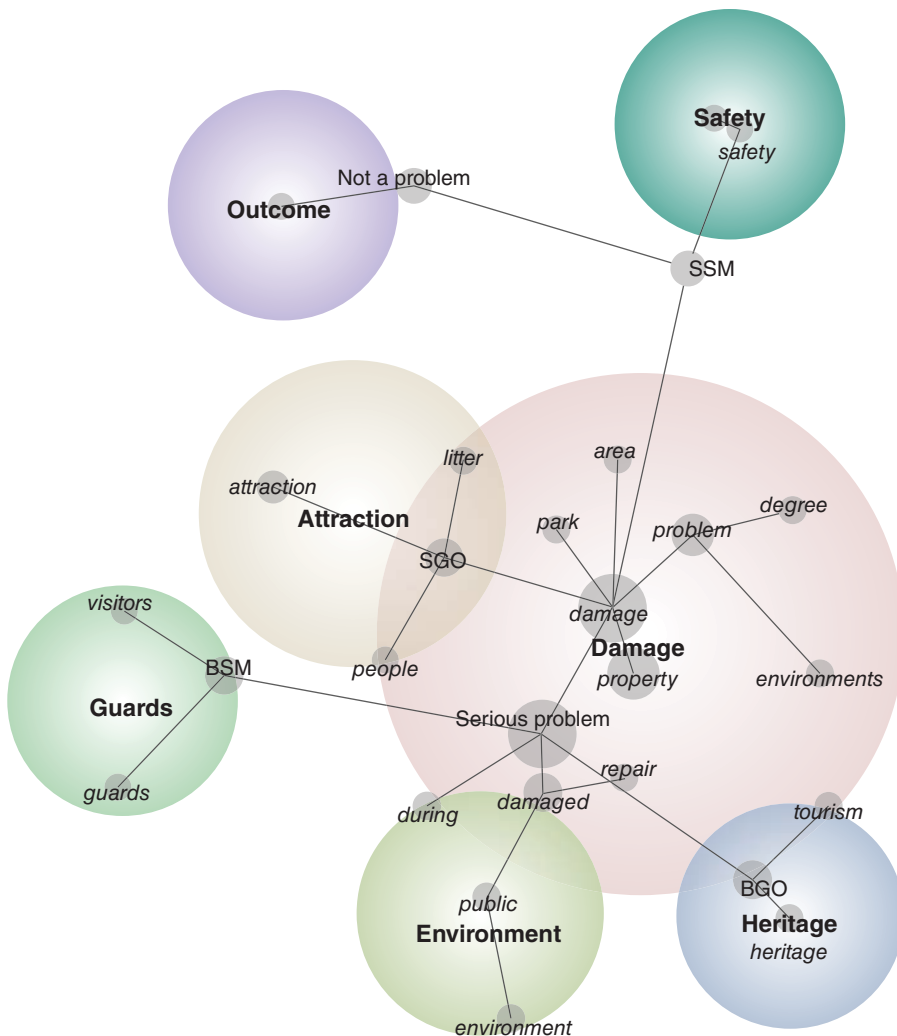


Fig. 9.2. Stakeholder groups' attitude about property damage at visitor attractions.

attractions in Singapore. This view could be substantiated by one site manager's remarks: 'Damage to property does not happen very often in Sentosa, and I do not see it as a serious problem. Most of these damages such as litter and graffiti can be removed, so I will not consider it a serious problem.'

The SSM group is linked directly to the 'safety' theme and the 'outcome' theme. The direct linkage with the safety node signifies the importance of visitor safety to site management. A site manager at a Singapore attraction commented: 'It is a medium-sized problem unless it affects safety. If they damage the slides and all those kinds of thing – inside the park – and there are broken pieces of plastic, then it will cause very serious injury to the guest.' The direct link with the outcome node presents an interesting perspective. As evident from the comments below, site managers do not consider unintentional damage as a problem. The attraction managers actually felt it was important to establish the intention before classifying the outcome as a problem. 'Deliberate damage is not common in attractions in Singapore. Wear and tear due to high traffic flow of guests is more common.'

On the other hand, the attitudes of the SGO group appeared to consider property damage as a serious problem. Though there is no direct link between the SGO and 'serious problem' nodes, the proximity signifies an association. The link between the two concepts is through the damage node. The BSM and the BGO groups also consider property damage at visitor attractions as a serious problem. Comments regarding the seriousness of the problem are illustrated by one typical response: 'Personally speaking, graffiti and other forms of property damage are a serious problem. It reduces tourism in and to Thailand.'

Having established that property damage is considered as a serious problem by the three stakeholder groups (SGO, BGO and BSM), results of the relative importance given to various themes by these stakeholder groups are now given. As stated earlier, the more often these concepts are mentioned during the interviews, the stronger the association and the closer the theme appears to a stakeholder group in Fig. 9.2. Of those who rated property damage as a serious problem, the BGO group recorded 86% agreement (6/7) within the group regarding the seriousness of the problem. The SGO group ranked second with 67% agreement (4/6). The BSM group was a close third with 57% agreement (4/7) with the view that property damage was a serious problem at visitor attractions.

The BGO group's comments were linked closely with the 'damage' theme and the 'heritage' theme. The most relevant concepts in the 'damage' theme were repair, tourism, damage and problem. A typical quotation by a government official relating to 'damage' was: 'Why it is a serious problem is because it is not only monetarily expensive to repair, but it also creates a bad impression on our guests who came after the incident and then they come across these damaged properties.'

The importance given to protection of heritage property by government officials in Bangkok is evident from the following quote: 'It also damages our heritage and the culture of property. But it is not a recognized problem.'

The SGO group who rated property damage as a serious problem was also highly sensitive to the 'attraction' theme. However, they also noted the loss due to property damage. One government official from Singapore observed that 'The attraction will look ugly. It will discourage visitors from coming to the attraction.'

The BSM was the last group who viewed property damage as a serious problem. This group felt most connected with the 'guards' theme. The site managers interviewed were of the opinion that visitor behaviour is best managed with surveillance. The emphasis was on human surveillance in the form of guards and patrols during the day and night. Some typical comments made by site managers in Bangkok were as follows: 'They should not touch the artefacts and follow the instructions of the tour guide. We have guards posted all over the property to provide vigilance.'

*What are the site managers' and local government officers' responses to property damage at visitor attractions?*

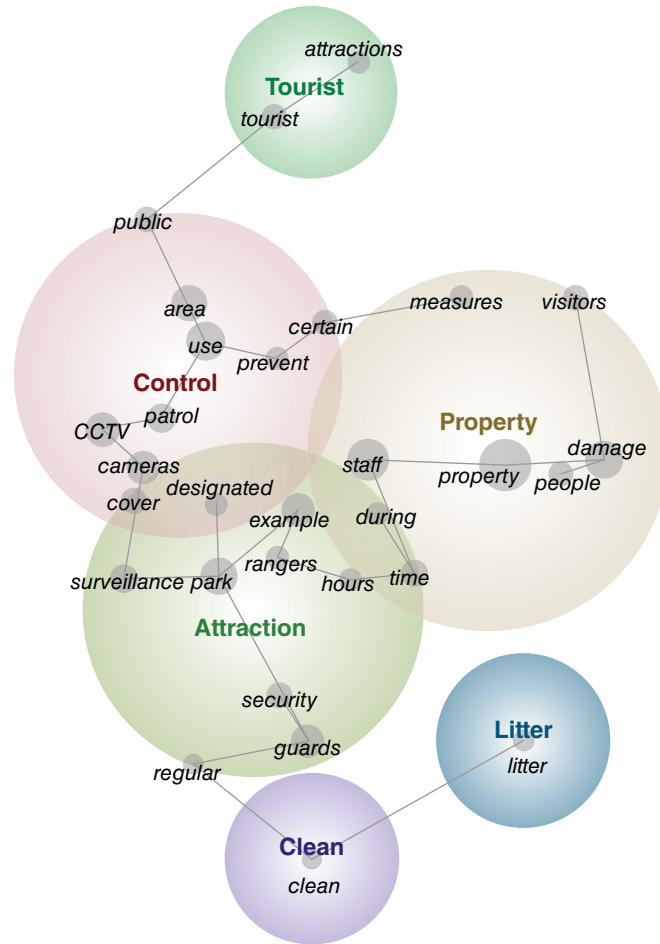
This section of the study evaluated the current responses of stakeholders to address property damage at visitor attractions. Relevant text from the interview transcriptions was again analysed with the help of Leximancer software. Figure 9.3 provides a visual summary in the form of broad themes, i.e. main approaches, adopted by stakeholders to address property damage. The content analysis algorithm identified six dominant themes representing stakeholder responses: 'control', 'property', 'attraction', 'tourist', 'litter', and 'clean'. The key concepts for each theme are as follows:

- Control: use, area, CCTV, cameras, patrol, cover, public and prevent.
- Property: property, staff, damage, time, visitors, people and measures.
- Attraction: park, guards, example, surveillance, security, hours, rangers and regular.
- Tourist: tourist and attractions.
- Litter: litter.
- Clean: clean.

The connectivity rates of the six themes are presented in Table 9.3. 'Control' is the strongest theme in the narratives of stakeholder responses to property damage at visitor attractions, with connectivity at 100%. In Leximancer, the connectivity score indicates the relative importance of the theme, with 100% being the most important (Wu *et al.*, 2014). Higher connectivity of concepts, such as closed-circuit television (CCTV), cameras, cover and patrol, suggest that human and electronic surveillance is a key component of the current property damage control mechanisms. A site manager from Bangkok suggested, 'The temple compound is a gated community with designated entrance and exit. We have installed surveillance cameras and security guards.'

'Property' emerged as the next most powerful theme with 96% connectivity. The linked concepts with the theme (staff, time, property and measures) suggest that site managers and government officials rely on strategies that involve the attraction employees to manage visitor attractions. Additional concepts such as time, visitor and property indicate use of operation hours and other time-based measures to protect the property from damage. Typical comments are: 'Some sections are enclosed with designated entry and exit points, but most of the property area is open for public access. We use CCTVs at some public places, but it does not cover the entire park.'

The 'property' theme highlighted the role of small businesses and tenants within a large attraction site. The residents and businesses dependent on the attraction are sharing the responsibility of providing guardianship and maintenance. Comments suggesting active involvement of businesses within attractions include: 'The shops and restaurants use their own mechanisms inside their property' and 'Staff are moving around during the day. However, there are places with less human traffic where property damage is severe.' The preceding statement emphasizes the inability



**Fig. 9.3.** Current responses of stakeholders to address property damage at visitor attractions.

of the attraction management to provide guardianship for the entire property, thus implying the shared responsibility of residents and businesses in and around the specific sites.

The ‘attraction’ (management) theme was another key grouping of concepts, with 84% connectivity. It is well connected with relevant attraction management concepts such as security guards, human and mechanical surveillance, night-time and daytime security, hours of operation, and patrolling rangers. Some typical remarks include: ‘We have tourist police patrol; provide the information and public relations such as the penalty for littering in the public space or in attractions. We ban drawing of graffiti and check visitors if needed.’

‘Tourist’-based strategies emerged as an important theme related to curbing property damage. This theme incorporated the importance of reaching out to the would-be perpetrator. Both the site managers and the local government officer groups stressed the importance of visitor management. A site manager from



**Table 9.3.** Approaches to reduce vandalism: dominant themes and their connectivity.

Dominant theme	Connectivity (%)
Control	100
Property	94
Attraction	84
Tourist	13
Litter	5
Clean	4

Singapore commented on the importance of information to the visitors: '[To] provide accurate information about tourist behavior, what "should they do" and "should not do" while visiting the attractions. If I see bad behavior of a tourist, I always check them and correct their behavior.' Another administrator from Bangkok expressed his views on visitor behaviour management and commented: 'We have posters or signs about expected behavior in the park. We always have guards to protect the park at important points such as entrance/exit and rides'. Similar remarks regarding the importance of visitor behaviour management were made by government officials. Typical comments include: 'We provide information to tourists and visitors to Bangkok via our website. We give them "dos and don'ts" leaflets when they arrive in Bangkok or visit attractions or at the hotel reception.'

The 'litter' theme and the 'clean' theme are well connected to the 'attraction' theme. Several interviewees mentioned the litter and clean words in the same sentence during the interview, such as in: 'We have a group of cleaners who rapidly clean the litter at regular intervals. The legal department also takes actions against perpetrators.'

### 9.3.4 Discussion

This study evaluates stakeholder responses to property damage at visitor attractions. Attitudes and responses of key stakeholders such as site managers and government officers are explored. With the exception of site managers in Singapore, the stakeholder groups consider property damage to be a serious problem. The findings also suggest that stakeholder responses are influenced by different priorities. Stakeholder groups give different emphasis to heritage value, environmental protection, surveillance, repair and maintenance, and so forth. The findings offer initial support to the conclusions of Nepal and Lu (2009) who suggest that the differences in stakeholders' perceived priorities are influential in the actual design and implementation of operational strategies to address property damage (see also Fyall *et al.*, 2008). In relation to stakeholder responses to property damage, the findings reveal that the stakeholder groups adopted a range of strategies to address property damage at the visitor attraction under their supervision.

Two distinct sets of strategies emerged. The first set of strategies is directed at the visitor and includes all attempts to influence visitor behaviour. The approach emphasizes people's understanding of the environment via communication. The style of

work also enhances *interpretation*, which encompasses the various ways in which the attraction management communicates with the visitors (Moscardo and Ballantyne, 2008). The second set of strategies target the property and the management of the physical setting. This focus involved making it difficult to damage different features of the property (target hardening). Additionally, and as in previous studies, carrying out timely repairs and maintenance was identified as preventing a kind of damage contagion in the attraction space (Katy, 2007; Ekblom, 2011). Regarding both Bangkok and Singapore, the study reinforces the view that the 'crime prevention through environmental design' (CPTED) principles are at the fore in reducing property damage (Cozens, 2008). Overall, these two approaches may be seen as a contrast between managing the hard architecture of the place (Sommer, 1969) and the soft infrastructure of the setting (Pearce and Wu, 2015).

The property theme of the concept map (Fig. 9.3) illustrates the emergence of a damage prevention role for the immediately affected small businesses and staff. This finding signifies the importance of the community's current role and future participation in initiatives to address property damage. The significance of the local business community in attraction management has been given only modest coverage in the tourism literature. Some studies of attractions in rural and urban settings have discussed community engagement and participation as a stakeholder activity (Fyall, 2008; Timur and Getz, 2008; Henderson, 2010). The findings of the current study can be linked to other ownership and caretaker role strategies to manage site damage that has been highlighted in the wider literature.

## 9.4 Wider Implications

Several wider control mechanisms and types of influence can be added to the damage control tactics already reviewed. Legal and economic levers are one form of controlling tourist-linked vandalism. The double meaning inherent in the remark that Singapore is a 'fine city' exemplifies the setting out of rules, and financial disincentives supported by effective public vigilance to reduce damaging tourist behaviour. Making tourists pay fines for environmentally and socially unattractive behaviour (e.g. littering, spitting and graffiti) requires tourists to adapt intelligently to local rules. The limiting factor in this approach is the expense of enforcing these penalties. Economic disincentives can however be matched by more positive forms of encouragement. Tourists may be less frustrated and less likely to inflict damage on the setting when an economic incentive is offered. Graded and varied attraction prices at sites coupled with longer hours of opening can shape the flow of tourists especially during periods of intense seasonal activity (Baum and Lundtorp, 2001). Intelligent decisions by tourists, which fit with their motives of exploring settings with fewer others, can be manipulated by off-season discounts and shrewd marketing. The pressures of crowding and damage to resources may therefore be lessened if visitors have a more comfortable environment where their goals for visiting are easily realized.

A second mechanism prompting positive tourists' experiences includes preparing tourists better for their attraction visit. Lu (2013) reported that well informed visitors treat their holiday experience and settings more sympathetically than those who have poor expectations of what a setting can offer. Importantly, information and guidance

about what tourists might see and experience can reduce stress and promote mindful, self-aware and responsible behaviour.

The role of future technologies to either stimulate or punish inappropriate behaviour was not considered by the stakeholders in the study (cf. Ghazal *et al.*, 2012). Wiseman (2007) reported that a sense of being observed is important in shaping good public behaviour. These remarks about watching over public spaces echo the foundation ideas about limiting vandalism and criminal behaviour first offered by Newman (1972). Such vigilance can be achieved not only through the presence of local ownership but can now also be promoted through smart technology devices. The use of recorded voices and prompts, which can be embedded in seats, walls and bins, can have this kind of salutary effect on certain kinds of sustainable behaviour, such as preventing littering and promoting recycling (The Fun Theory, 2015). Additionally, and importantly in many countries, the rising use of CCTVs to monitor public spaces has a key role in recording public behaviour. In the middle of the 20th century the novelist George Orwell conceived of a future where public life would be monitored by an autocratic state administration. In the dystopia he imagined citizens were stripped of their freedoms by the omniscient observers of their daily activities. In the 21st century these views can be updated. The ability to observe others in this way remains a powerful influence on public life but has considerable merit in controlling and limiting unsociable and criminal conduct at tourist attractions and in the wider civic environment.

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# 10 Augmented Reality Application to Museum Visitor Experiences

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## 10.1 Introduction

Augmented reality (AR) is a technology that is gaining significant interest across diverse areas of the tourism industry. This is particularly true for museums since these are associated with knowledge, learning and experience sharing (Morabito, 2014). Indeed, cultural heritage attractions such as museums no longer serve only as an agent of conservation but also seek to provide visitors with an authentic experience (Prentice, 2001; Harrison, 2005). Evidence shows that museums now offer consumptive activities combined with personal experiences to appeal to a wide audience (Prideaux and Kinnimont, 1999; Siu *et al.*, 2013).

Visitors in such museums often experience and learn about history, and the use of technology here presents a range of opportunities to create interest among visitors. Unlike conventional museums, a growing number now focus on elevating the museum experience, allowing visitors to retain a high level of knowledge and experience sharing. This allows for a better interpretation of the origins of museum artefacts (Ramkissoon and Uysal, 2011). A generic concern among museum curators is to create an interaction between visitor experience and technology application, and technology can become the single most influential factor in a tourist destination determining its popularity (Buhalis and Law, 2008).

Selection of a particular technology to apply in a particular context in a tourist destination requires consideration of both visitor demand and capacity of that destination (Azim and Hassan, 2013). AR can be particularly valuable in the tourism context (Jung *et al.*, 2015), however introducing this sophisticated technology as a tool for visitor management in museums needs to take into account a range of factors such as carrying capacity and available facilities. Technology applications in museums can visibly help develop the entire site from several perspectives, including branding and marketing (Mitropoulos and Tatum, 2008; Yu and Tao, 2009).

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The literature shows that AR is popular in countries across the world, mostly in Europe and parts of Asia (Kounavis *et al.*, 2012). This chapter aims to replicate cited examples of AR application in museums in developed countries in the context of Bangladesh, an emerging tourist destination. Bangladesh has distinctive features encompassing history and culture, suggesting that AR can assist in the implementation and promotion of cultural tourism through activities in museums. The Bangladesh National Museum is identified as the most suitable museum for this AR study due to its popularity, carrying capacity and location.

## 10.2 Literature Review

### 10.2.1 Augmented reality – the concept and application

AR is an advanced stage of virtual reality that blends computer-simulated imageries in a real environment (Yovcheva *et al.*, 2012). This technology is commonly associated with 3D and visuals (Dadwal and Hassan, 2015). A more comprehensive understanding of AR is offered by Mashable UK (2014), which defines it as either a direct or indirect, live view of a physical, real world environment. Elements of such views are augmented by computer-generated sensory input such as video, sound, GPS data or graphics. AR is related to a commonly known concept ‘mediated reality’ where a real view is modified, augmented or possibly wiped out by a computer. Thus, technology can enhance a user’s perception of reality while consuming the product. Supported by sophisticated AR technology with computer vision and object identification, the user’s contiguous actual world turns digitally interactive. Simulated information about the surroundings and its objects can then be superimposed on the existent world. From this perspective, AR is different from many other entertainment utilities.

### 10.2.2 Museum experiences

In museums, many visitors look for experiences that combine historic facts with some contemporary artefacts (Kirshenblatt-Gimblett, 1998) for cultural consumption (Ramkissoon, 2015). Museums across the world are constantly challenged to retain visitors’ interests and attract the new sophisticated consumers in search of distinctiveness (Ramkissoon and Uysal, 2014; Ramkissoon, 2016). Early age (i.e. less than 18 years old in this context) visitation numbers need to be increased in museums in proportion to visitors in higher age brackets (Kotler *et al.*, 2008). This suggests that technology applications may need to be prioritized to arouse visitors’ attention. Evidently, museums compete constantly, with contemporary technology relying on entertainment industries since those are arguably far better equipped with regard to technology applications (Kirshenblatt-Gimblett, 1998). Hence, the significance of AR technology lies in truly engaging visitors in experience-generating events. AR technology applications in museums should not only become a medium to attract visitors of different age groups but should also appear as the centre of that establishment’s operational activities through engagement of visitors in more interactive experiences (Jung *et al.*, 2015).



A drop in visitation numbers can also result from negative word-of-mouth related to limited display and inadequate learning facilities (Rentschler and Hede, 2007; Hassan, 2015), which may impact on the establishment. Previous research, with few exceptions (e.g. Kounavis *et al.*, 2012; Jung *et al.*, 2015), has seldom explored how AR application in museums could enhance the visitor experience (Shen *et al.*, 2011). But AR could possibly help in augmenting the reality through computer-simulated graphics or animations (Olsson and Väänänen-Vainio-Mattila, 2013) and thus generate diverse knowledge and experience sharing. Museums are increasingly looking to be popular among visitors (Siu *et al.*, 2013) and application of AR may be an important marketing strategy.

### **10.2.3 Tourism in Bangladesh – museum visitation and the emerging tourism economy**

Bangladesh is an emerging tourist destination with a rich cultural heritage (World Travel and Tourism Council, 2015) that is often displayed in museums built adjacent to major archaeological and cultural sites. Museums in Bangladesh range from small to medium in size. The Bangladesh National Museum in Dhaka remains the principal one to oversee, monitor and coordinate all museums, and to represent the Bangladeshi heritage to a global audience. Tourism in Bangladesh is still in its infancy, though increasing. The Government of Bangladesh declared 2016 as ‘The Year of Tourism’ highlighting its growing importance for the national economy (Bangladesh Sangbad Sangstha, 2015). Existing national tourism policies are seen as promising (Hassan and Burns, 2014) and when benefitting from the set developmental policy frameworks, the tourism industry is more likely to increasingly contribute to the national economy.

The Bangladesh National Museum was established in 1913 as the Dhaka Museum and re-inaugurated in 1983 under the current name. It has a rich history and is well designed for displaying the comprehensive Bangladeshi heritage (Russell and Cohn, 2012). In addition to its enriched conservation laboratory, the displays are chronologically housed in numerous departments (such as the departments of history and classical art, ethnography and decorative art, natural history, contemporary and world civilization) (Bangladesh National Museum, 2015). This museum has the potential to accommodate an updated technology (Mahmud and Rahman, 1987) such as AR.

## **10.3 Examples of AR Technology Applications in Museums**

This section presents and explains examples of AR applications in European museums, considering possible replication in the developing economy of Bangladesh. The literature suggests that the visitor experience is desired to be exciting, amusing (Jiang *et al.*, 2015) and free from complexities. Museums in a number of European countries (e.g. in Greece, the UK and France) are either initiating or updating facilities to offer better visitor experiences through diverse technological projects (Kaiser *et al.*, 2014), resulting in a kind of digital renaissance in museums across Europe. The outcomes of such projects are a revival of the past (Ramkissoon and Uysal, 2014) and increased visitor engagement. These projects aim to establish various digital

agendas of European museums. One example is a European Union project, the Cultural Heritage Experiences through Socio-Personal Interactions and Storytelling (CHESS) (The CHESS Project, 2015). According to the Community Research and Development Information Services (2015), the project documents the cultural heritage institutions where the engagement of visitors and in particular the 'digital natives' are contested, and provides visitors with learning experiences through newly developed interactive digital libraries.

The principal objective of CHESS is to engage in research, and to implement and evaluate an innovative conceptual and technological framework (CHESS Project, 2015). Such frameworks encompass cultural sites' personalized interactive stories for visitors, authored by experts having vast knowledge in cultural content. Part of the success of this project relies on the application of narrative-oriented mobile and mixed reality technologies. The firmly integrated framework has been applied and tested in the world's most renowned cultural heritage sites, including two museums: the Cité de l'Esace in France and the New Acropolis Museum in Greece.

### **10.3.1 The UK experience**

The UK is a hybrid ground of AR technology application in museums that informs the analytical framework of the present study. For instance, specialized displays in the British Museum are equipped with one of the world's leading interactive digital system to support AR technology. Cultural heritage displays result in increased visitation and revenue generation (Wheatley, 2010) and according to Museum-iD (2015), the British Museum traditionally welcomes innovative technology with AR. The 'Guirella' exhibition organized by the British Museum's digital learning team illustrated the application of AR, offering numerous layers of invisible interpretation in galleries. AR was further used to create virtual layers in the gallery displaying dissimilar content. Also, the Natural History Museum in London is applying AR to make a multimedia theatre with dinosaurs, fish, early humans and other animals in an interactive film (Museum-iD, 2015). An ideal application of AR here is to show an extinct plant or animal using 3D models. In addition to contributions from AR technology companies, the Creative Augmented Realities Hub of the Manchester Metropolitan University has been facilitating AR technology application in museums in cities such as Dublin, Manchester and London (Creative Augmented Realities Hub, 2015). The UK thus visualizes the application of AR both in knowledge development and in practice.

### **10.3.2 The Greek experience**

Examples of AR applications in Greece are relevant to the present study in illustrating the crucial role of organizational support in AR application in museums. The CHESS project has tested AR in the new Acropolis Museum in Athens, allowing other museums in Greece to benefit from this advanced technology. In the Acropolis Museum, technologies are constantly updated by a team of experts (Internet-science, 2015). These experts are seeking to modify sculptures or architectural remains using

sound, colour and light. AR has been widely used in this context. In yet another case of AR application, the technology is immersed with experiences in a museum where children enter story puzzles by using an advanced tablet app named 'A Gift for Athena', developed for a popular game (Vlahakis *et al.*, 2002). This game offers rewards to users who find specific statues displayed in the museum, and thus presents a comprehensive education of the museum artefacts to young customers.

## 10.4 Relevance of AR to Bangladesh Museums: A Study

This section critically assesses innovative technology applications in European museums, and their relevance to museums in Bangladesh, an emerging tourist destination. The main objective of this exploratory qualitative study was to gain initial insights into possible applications of AR in Bangladesh. A qualitative approach was deemed necessary since the study was context-specific.

### 10.4.1 Study methodology

Data were collected from visitors at the Bangladesh National Museum. The researcher approached respondents on a next-to-pass basis explaining the purpose of the study. Forty open-ended interviews were thus conducted. The open-ended interviews covered generic aspects of museum visitation in Bangladesh, also allowing for insights into museum consumers' perceptions and expectations of AR as an innovative technology. Views were further drawn on the respondents' opinions and guidance on the application of innovative technology in the museums of Bangladesh. This approach is in line with Miles *et al.* (2013). The length of the interviews varied between 10 and 15 minutes. The recorded information was transcribed on the day of the interview to ensure that all the conversational data were captured when the interview sessions were still fresh in the mind of the interviewer. Each interview was individually tailored to elicit rich information, and respondents freely expressed their ideas and opinions. Content analysis was employed to determine the most relevant themes from the qualitative findings. Key findings from this exploratory study are discussed in the light of the relevant literature.

### 10.4.2 Results and analysis

#### *Visitors' comprehension of AR – concept and applications*

An important observation from the current study was respondents' lack of knowledge about AR and its sophisticated nature. This is evidenced in the interview excerpts from visitors, such as:

- 'What is it ... which type of technology is AR? I have never heard about it.'
- 'I have heard about visual technologies but not really augmented reality as such.'
- 'I see advertisements on the internet very often. Being a student, I need to have knowledge about updated technologies, yet, I do not know a lot about AR.'

### *AR technology in an emerging tourism economy*

Tourism in Bangladesh is receiving considerable attention with the growth of domestic tourists' spending and the soaring number of expatriate Bangladeshis (Bangladesh Sangbad Sangstha, 2015). The eagerness of visitors to visit a museum relies on its uniqueness and exceptionality (Hassan, 2013). Cultural and heritage displays in Bangladesh can be remarkable in terms of museum users' acceptance of innovative technology. The application of AR can transform the visitor's experience, and in turn their behavioural intentions to revisit and recommend to family and friends (Ramkissoon and Uysal, 2011). This is exemplified with respondents' views, such as: 'Visitors in heritage destinations and museums tend to experience the past and would likely appreciate the use of technologies to get better experiences'. One of the visitors stressed the importance of AR application in Bangladesh: 'Even I do not know AR but I firmly believe that a technology of this type can possibly enhance visitor experiences'.

Home entertainment and the internet pose threats to museums rendering the application of AR particularly important. An important comment noted among respondents was the reliance on innovative technology: 'Owing to technological excellences, visitors in a museum are becoming technology savvy seeking innovative experiences'.

Visitors do not always rely on relatively conventional technologies, and in this perspective AR can become a reliable alternative option. In actuality, opportunities lie in popularizing technology-supported platforms for AR to achieve the best visitor experience at a museum. AR is a relatively uncommon platform to create wider experiences for visitors. Mass popularity of this technology can benefit from its innovative nature backed by sophisticated visitors' searches for authenticity and their natural inclination to try new things (e.g. Ramkissoon and Uysal, 2014; Ramkissoon, 2016). This argument is reinforced by an expatriate Bangladeshi visitor from the UK: 'I can see huge differences between museums in Europe and here in Bangladesh. This gap mostly remains in technology use and Bangladesh needs to apply innovative technology'.

### *AR technology application in the Bangladesh National Museum*

Literature evidences that innovative technology such as AR is effectively and commonly placed in European museums. However, in Bangladesh, the barriers to AR application are the inadequate technological, financial and structural capacities. The Bangladesh National Museum, with considerable support from both the public and private sector, is an exception.

Consumption of heritage in Bangladesh encompasses both cultural and non-cultural artefact consumption. Hence, heritage displays can hugely benefit from technology use. This implies that technology can incorporate heritage displays where AR can become a foremost choice to cater for expectations from numerous visitor types. This specific technology applied to museums in Bangladesh can be entertaining and provide better learning experiences. For instance, in the Bangladesh National Museum, AR technology can provide visitors with a deeper knowledge of the historic events and artefacts on display, in an interactive environment. Provision of technological assistance can provide more scope for museum visitors, who can experience technology, entertainment and learning concurrently and in equal measures. The enhanced visitor experience could change visitors' perceived views of the environment. This suggests that museum management could consider incorporating AR into cultural and heritage displays in specific museums. Bangladesh has a glorious heritage and historic

artefacts, both of which remain unknown to many locals. Use of sophisticated technologies like AR in museums could attract visitors. This is exemplified in the museum visitors' quotes: 'The basic reason to visit a museum is that visitors tend to see what existed in the past. In museums in Bangladesh, a balanced use of technology can grab attention of more visitors'. Another visitor opined, 'It would be really great to see and learn the glorious past of Bangladesh with the support of technology'.

With its infrastructural capacities, location and popularity, the Bangladesh National Museum could potentially support AR technologies. It is situated in the capital city of Dhaka and receives large numbers of visitors. Recently built, structurally and logistically it makes for an ideal icon in Bangladesh (Qureshi, 1990). Also, it is central to a wider tourist destination visitor network and has strong links with both national and global institutions. Thus, the Bangladesh National Museum in Dhaka is an ideal location to support and implement AR technology to promote centuries of heritage of the country.

#### *AR technology application in museums of Bangladesh – key challenges and promises*

While a possible implementation of AR technology can be introduced in the Bangladesh National Museum as an example to other publicly funded museums in the country, one of the biggest challenges for application of AR in those museums is that they are relatively less well equipped with the required infrastructure to support such an advanced technology.

As shown above, the notion of AR is relatively new in Bangladesh and there are precious few examples of its use. It is evident from the findings of the study that the use of AR in Bangladesh still remains just a prospect, mainly because the country lacks the required infrastructure to fully support new technologies. 'The very generic concern that AR technology can benefit all museums in Bangladesh is questionable because of its sophisticated features, operational costs and expertise requirements.'

Also, concern arises regarding the museums' capabilities, with limited resources, to support an unconventional technology: 'Museums in Bagerhat can hardly support any technology application due to infrastructural incompatibilities'; 'Maybe one or two museums in the country can support both introducing and implanting an innovative technology as AR'. These quotes suggest that museum visitors are concerned about the lack of infrastructure in museums in Bangladesh, although they appreciate the benefits of AR technology.

Application of AR technology is receiving attention from museum curators and visitors at several destinations. However, in Bangladesh, clear dissimilarities exist in visitor profiles, logistical support and institutional capacities to popularize this new technology, suggesting the need for more research in this context.

## **10.5 Discussion**

This chapter discusses the potential of AR in enhancing the visitor experience in an emerging tourism economy (Bangladesh).

The study's exploratory findings suggest that AR may be applied to museums such as the Bangladesh National Museum given adequate infrastructure. Museums in Europe have been pioneers in application of innovative technologies such as AR.

The institutional support facilitates both technology development and practical use. Museum curators in Europe rely on their visitor profile, segments, 'personas' and preferences. Data are mostly collected through research conducted by the museum personnel using observations, ethnographies and visitor surveys to generate their visitor profile (e.g. Morris Hargreaves McIntyre, 2006). Programmes are designed based on those findings aiming at optimizing visitor satisfaction (e.g. Nunkoo and Ramkissoon, 2011; Ramkissoon and Mavondo, 2014), which in turn may lead to repeat visits and positive word-of-mouth (Ramkissoon, 2015). Hence, innovative technology application needs to be emphasized for these benefits.

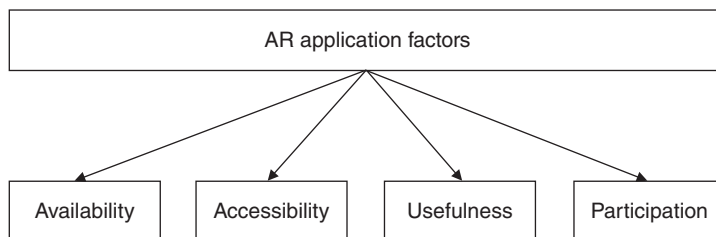
An innovative technology application can enhance visitor experience depending on its perceived usefulness (Davis, 1989). Visitors in a museum context require availability, accessibility, usefulness and participation opportunity from an innovative technology. One of the key themes of the interviews was therefore the user-capacities required to become familiar with AR. But saturation of AR should not present a challenge as its operation is relatively easy, exemplified in museums in Greece and the UK. Thus, the perceived usefulness of AR in the Bangladesh context remains high.

An innovative technology needs to engage visitors, increasing their interest. A combination of all of these factors (i.e. availability, accessibility and usefulness) of a specific innovative technology may bridge the gaps between heritage offerings of a museum and visitor expectations. Figure 10.1 illustrates the basic factors required to facilitate the application of AR in a museum context.

This is particularly important with regard to branding and marketing of a museum. Effective strategies need to be taken and implemented to narrow down or eliminate such gaps since branding and marketing of a museum partly rely on visitors sharing their experiences with others. In general, such gaps remain acute in museums in Bangladesh, creating scope for introducing and applying a competitive and useful technology such as AR. Traditionally, museums in Bangladesh act as a meeting point of relatively learned visitors, meaning that there are opportunities to integrate tourist interests with technologies such as AR. Applying this technology in Bangladesh could produce unconventional visitor experiences for diverse visitor segments.

### 10.5.1 Practical implications for Bangladesh

The structural capacities of museums in Bangladesh are weaker compared to museums applying AR in Greece and the UK. This study suggests that visitors



**Fig. 10.1.** Factors required to enable the application of an innovative technology in a museum setting.



to the Bangladesh National Museum in the capital city of Dhaka have good awareness of recent technology applications. The findings from the qualitative interviews further suggest that the Bangladesh National Museum could possibly be equipped with sophisticated technologies like AR by upgrading its infrastructure and employing more staff. With Bangladesh's historic past and heritage, the introduction of AR in museums can be mostly educational or entertaining. However, the potential for greater revenue generation relies on increased expenditure by visitors.

## 10.6 Conclusion

Museums are assets for displaying the heritage of a country, representing historic and cultural backgrounds of a particular geographical destination to local and global visitors. The importance of visitor experiences in museums thus requires proper attention from responsible authorities. Museums can offer unprecedented significance to general visitors as well as to expert visitor segments. The introduction of an innovative technology such as AR in museums is potentially significant in diverse and cross-country contexts.

In museums, AR can be used to provide non-conventional, unique experiences to consumers of cultural heritage. This technology represents the historic past in accessible and interesting ways, providing comprehensive learning and enriched experiences. AR immerses traditional means of entertainment into a non-traditional format aiming to generate deeper interest among visitors. Extinct artefacts can appear lively and movable in a real-time environment.

AR technology not only displays historic artefacts as real but also allows visitors to experience the past (Olsson and Väänänen-Vainio-Mattila, 2013) and, as such, can help to attract different visitor segments. AR technology use supports the display of items in a museum without necessarily displacing or substituting their historic and authentic values. This allows visitors to become involved in moments of experienced authenticity (Ramkissoon and Uysal, 2014; Ramkissoon, 2015).

The study here suggests that in Bangladesh, the National Museum in Dhaka may be an appropriate place to implement AR technology; the Bangladesh case can potentially be viewed as representative of emerging tourism economies. Findings from this exploratory study however are far from conclusive, suggesting the need for further research in similar contexts. The application of AR in this museum reflects the dilemmas faced by developing economies. The three key barriers identified in this study are the unavailability of experts having sound knowledge on AR, the required spaces for display and the lack of visitors' knowledge about AR. This chapter therefore suggests provision of required facilities in a number of selected museums in Bangladesh to get the benefits of a new technological innovation such as AR. It is hoped that this exploratory study will initiate conceptual debates relating to technology and authenticity when these two aspects are mostly seen as contradictory. In practice, museum displays are mostly seen as authentic and the application of an updated technology as AR may attract diverging views from visitors. The application of such technology in museums can be challenging and necessitates the need for further studies.



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**Part IV    The State of the Art in Guiding  
and Interpretation**

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# 11

## Strategies for Successful Interpretation Techniques in Visitor Attractions: The Operationalization of Guided Tours in Museums

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### 11.1 Introduction

Tourism attractions considerably influence the competitiveness of destinations. Museums in particular play an important role as one of the most important attractions within cultural tourism. Interpretation is one of the most important methods for visitor management (VM), especially because of its ability to add value to any type of tourism attraction (de Rojas and Camarero, 2008; Weiler and Black, 2014). Guided tours are one of the oldest, most effective and most valued techniques to deliver interpretation (Ham and Weiler, 2007; Munro *et al.*, 2007).

The way interpretation techniques are implemented may significantly determine the appeal of the attractions for potential visitors. Extensive research into VM techniques and, specifically, interpretation, has been conducted in the last decade. However, despite the importance of guided tours within interpretation literature, limited attention has been given to factors that should be considered in its operationalization. Literature on guided tours discusses the relevance of a multi-approach interpretation (e.g. including multisensory approaches and the combination with other interpretation techniques), thematic approaches and the customization of the interpretation to ensure its success (Weiler and Walker, 2014). However, empirical studies on guided tours frequently partially characterize guided tours from one or a very limited number of attractions, focusing on specific features of the tours. These studies do not allow for comparative analyses among several guided tours implemented in different attractions, thus limiting the conclusions that may be derived on factors and approaches to consider in the operationalization of this technique.

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Aiming to stimulate reflection and discussion on the design and operationalization of guided tours, this study identifies the most relevant factors to be considered in the operationalization of guided tours in museums. Initially, a literature review on guided tours is presented and an extensive list of features that should be taken into account in the implementation of guided tours is identified. Next, empirical research on the implementation of guided tours in a sample of Portuguese museums is carried out and the factors considered in their implementation are analysed. Finally, conclusions and implications relevant both to researchers and museum managers are provided.

## 11.2 Guided Tours as Valuable Interpretation Techniques in Museums

Interpretation goes far beyond entertainment or education based on the transmission of knowledge, deeply influencing visitors' overall experience and satisfaction with the visit to tourism attractions and destinations (de Rojas and Camarero, 2008; Huang *et al.*, 2015). Guides are expected to be mediators and cultural brokers that contribute to providing alternative interpretations of the places people are visiting (Jonasson and Scherle, 2012). The role of interpretation is not only to provide factual objective information, but also to enhance the enjoyment of places, arouse visitors' emotions, foster curiosity and facilitate attitudinal or behavioural change (Cunningham, 2004). Weiler and Black provide a comprehensive perspective of this communication process by defining it as:

engagement with tourists/visitors in ways that provoke them to think about and connect with natural and cultural heritage, including places, sites, people, artefacts, and natural and historical events, and that foster a sense of care and stewardship among tourists/visitors.

(Weiler and Black, 2014, p. 91)

Interpretation becomes, therefore, an important VM technique that permits both the enrichment of the visitors' experience and the preservation of tourism. Consequently, interpretation increases the competitiveness of tourism attractions and of destinations. Thus, literature on the potential of interpretation to raise visitors' satisfaction has focused extensively on debates surrounding positive word-of-mouth and repeat visitation's role in interpretation.

Guided tours are considered the oldest form of interpersonal, verbal or face-to-face interpretation (Ambrose and Paine, 2006; Munro *et al.*, 2007). They may also be the most effective and successful interpretation technique, as they convey a great sense of authenticity, provoke people's thinking and promote interaction (between guides and visitor, and among visitors themselves) (Brown, 2002; Ham and Weiler, 2007; Munro *et al.*, 2007). This form of interpretation has great flexibility as it enables visitors' questions to be answered and the interpretation message can be adapted to the interest and knowledge of the target audience, particularly in terms of language and type of information provided (Binks *et al.*, 1988; Miranda, 1998; Howard, 2003).

For Izquierdo and Samaniego (2004), a guide, as a link between the attraction and the visitor, must learn to position the visitors correctly in relation to objects and



other elements of the attractions, without overloading them with inappropriate, extensive or incomprehensible information. Thus, guides are frequently assigned multiple and interrelated roles, all of them based on the guide's communication skills: interpreter/educator, information giver, leader, motivator, host, conduit, public relations representative, experience/cultural broker or mediator (Cohen, 1985; Pond, 1993; Black and Weiler, 2005; Weiler and Walker, 2014).

The importance of guided tours has, over the years, led to the development of research on this technique. However, such literature usually refers to general research developed under the scope of VM techniques or interpretation, with limited attention being given to its specificities, such as guided tours (Durão, 2009).

### 11.3 Specificities in Planning and Operationalizing Guided Tours

The quality of guided tours is greatly determined by the guides themselves. According to ICOMOS (1993) and Ambrose and Paine (2006), a guide's bad performance can result in the dissatisfaction of visitors, visitors' loss of interest, or even destroy the attraction's reputation. Guides can assume a crucial role in providing meaningful and relevant alternative interpretations, in inspiring and provoking visitors to think and also in promoting visitors' interaction with the place visited and other visitors (Jonasson and Scherle, 2012; Huang *et al.*, 2015). Therefore, guides can make an important contribution to creating satisfying cognitive and affective experiences. Consequently, the importance of guides having appropriate training and enough knowledge to duly perform their role is widely mentioned (Pond, 1993; Brown, 2002; Howard, 2003; Feilden and Jokilehto, 2005; Ambrose and Paine, 2006), since 'training can successfully equip guides to engage visitors, impact their understanding and empathy, and enrich their experience' (Weiler and Walker, 2014, p. 9). Although there is no consensus on what kind of expertise the guides should have, researchers argue that their knowledge should be broad, covering areas from geography to nature, history, art, or even psychology and sociology. Guides should have a natural enthusiasm and, in addition to the vast body of knowledge previously mentioned, they need to know how to communicate with people of different ages, different interests and different social and educational backgrounds (Pond, 1993; Ambrose and Paine, 2006).

Considering the guides' contractual situation, and although many museums rely on volunteers, guides can be recruited and hired by the museums directly or by an external body/agency. In the latter case, the guides should be licensed, with the licensing process usually falling under the responsibility of the national tourism board or the ministry of culture (ICOMOS, 1993; Feilden and Jokilehto, 2005). The contact of visitors with people from the local community is highly valuable (Jonasson and Scherle, 2012). In some situations, managers may hire local community members or individuals associated with the original function of the attraction – e.g. soldiers, retired farmers or former miners – as guides (Gyimóthy and Johns, 2001; Howard, 2003; Ambrose and Paine, 2006). Training programmes and performance evaluations are also important to keep these agents abreast of the latest information and visitors' expectations. When the employment process is carried out directly by the museum, it is possible to effectively control the training and evaluation of the guides.

One of the most important aspects to consider when planning any guided tour is to be aware of the characteristics of the target audience, such as age group, the social context where people come from and possible physical or cognitive limitations (Johnson, 2002). For large groups (including school groups), a high level of organization may be needed, namely in providing parking for buses, specific ticket booking systems (including tickets at special prices), lockers, creating pathways to protect the exhibited objects, setting limits for the duration of the visit and preparing supplementary materials (Binks *et al.*, 1988; Brown, 2002). When addressing people with more specific needs, guiding adaptation may include individual tours, the assistance by language interpreters, strategic pauses to rest, tactile experiences and paths without architectural barriers (ICOMOS, 1993; Johnson, 2002; RNIB and Vocaleyes, 2003; Hillis, 2005).

The group size can also influence the level of contact established and thus the effectiveness of the visit. For this reason, managers often determine a minimum and maximum number of visitors per group. The maximum number may vary according to the number of guides available to accompany the group, the space available for movement and the way of getting around (e.g. pedestrian, by bus). The maximum number of people per guided tour group is usually 15–20. However, too few members in a group may also mean insufficient dynamics and interaction (Binks *et al.*, 1988; Miranda, 1998; Brown, 2002).

Guided tours may range from very comprehensive tours that cover the majority of the areas and elements of the museum, to tours limited to specific areas. Certain guided tours, known as ‘highlight tours’ focus on specific and unique elements (e.g. plants, animals). Comprehensive tours may provide a more wide-ranging perspective of the museum, but less comprehensive tours may be more useful when visitors have limited time to visit the attraction or have specific interests in a particular theme (Brown, 2002). Although museum tours are usually limited to indoor areas and to sites designed for the public, tours may also cover behind-the-scenes and outdoor areas (e.g. gardens) (Miranda, 1998; Brown, 2002; Howard, 2003).

The use of thematic approaches is a relevant strategy in interpretation through guided tours (Weiler and Walker, 2014). Guided tours may vary in terms of content or theme, and an attraction may offer only one guided tour or several tours with different themes. In the case of student audiences, guides can simply provide support to teachers (Feilden and Jokilehto, 2005), and the content may be adapted to programmatic content for different educational levels (Brown, 2002). Besides providing information that is specifically related to the attraction, guides should also give some generic information about technical issues (e.g. duration of the tour, desired behaviours and safety rules) and alert visitors to the need to preserve attraction features. Before beginning the tour, guides may also ask some questions to assess visitor characteristics (e.g. level of knowledge and level of interest in specific subjects) to adapt the content accordingly (Binks *et al.*, 1988; Hall and McArthur, 1998).

Several researchers (e.g. Jonasson and Scherle, 2012; Huang *et al.*, 2015) emphasize the importance of understanding visitors’ specific needs and adapting the information provided through guided tours accordingly. The possibility of adapting the language is a crucial factor to make guided tours more accessible and appealing to several types of visitors. According to Hall and McArthur (1996), the

discourse used in guided tours should be positive, concise, avoid technical terms and jargon, and be easily understandable. This also means taking into consideration visitor characteristics such as age, culture, interests and level of knowledge (Binks *et al.*, 1988; Gyimóthy and Johns, 2001; Howard, 2003). Johnson (2002) and Howard (2003) remark on the great value in guides using different languages, which determines the accessibility of the tour to visitors of different nationalities. Johnson (2002) also emphasizes the importance of guides knowing sign language or the availability of an interpreter, in order to make the tours more accessible to deaf visitors.

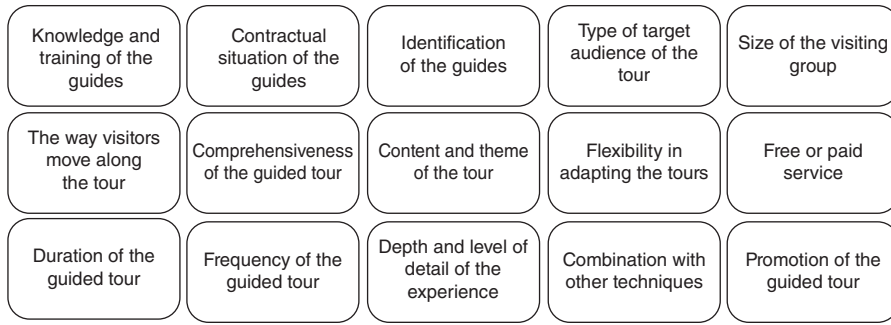
Other researchers also state that it is important to have the possibility of adapting the guided tours by permitting that: (i) visitors choose the elements they want to explore during their tours (Gyimóthy and Johns, 2001); (ii) guides provide additional information and answer questions (Binks *et al.*, 1988; Howard, 2003); (iii) guides may include stops in the tours allowing visitors (especially the elderly, pregnant women or others with limited mobility) to rest (Johnson, 2002).

Guided tours, as any other service provided by tourism attractions, depending on the context and tradition of each site, may be paid or free (Gyimóthy and Johns, 2001; Ambrose and Paine, 2006). The duration of the guided tours varies widely, and is determined by several factors such as the complexity of the experience or the level of detail provided (Gyimóthy and Johns, 2001; Feilden and Jokilehto, 2005), the season, time of the day or day of the week. Tours may take place every day, only some days of the week, in specific months, specific seasons of the year or, even, only on one specific day (e.g. when a specific event occurs) (Binks *et al.*, 1988).

Visitors' engagement with the place visited promotes active contact with that place and the co-creation of experiences, which seems to be one of the most important factors in creating rewarding experiences (Jonasson and Scherle, 2012; Weiler and Walker, 2014). Deeper experiences may be provided by appealing to sensorial perceptions, offering visitors the opportunity to touch objects, hear sounds, smell odours, taste specific substances and appreciate special visual effects. Gyimóthy and Johns (2001) and RNIB and Vocaleyes (2003) present some examples of these experiences, which include simulating a dark room or a landscape, getting hands and face dirty with charcoal, smelling the scent of drinks (e.g. whisky) and listening to music.

In the case of disabled or specific audiences (e.g. children), some strategies may be especially important such as: touch tours – where visitors can touch several objects (RNIB and Vocaleyes, 2003; Hillis, 2005); individual guided tours (Hillis, 2005); or detailed descriptions of the exhibitions' elements accompanied by an explanation of the context they are in (ICOMOS, 1993; Johnson, 2002; RNIB and Vocaleyes, 2003). Not only should interaction with the resources be promoted, but so should the interaction between the visitors and the guides and among the visitors themselves, offering an opportunity to discuss ideas and ask questions (Brown, 2002; de Rojas and Camarero, 2008).

Guided tours may become more attractive if combined with other interpretation techniques. While some researchers (Howard, 2003; de Rojas and Camarero, 2008) propose the combination of guided tours with representations and recreation of events, others suggest they be combined with technical demonstrations (Binks *et al.*, 1988), activities such as games (Binks *et al.*, 1988) or printed information (Johnson, 2002; RNIB and Vocaleyes, 2003).



**Fig. 11.1.** Factors to be considered in the design and operationalization of guided tours. (Based on Binks *et al.*, 1988; ICOMOS, 1993; Pond, 1993; Hall and McArthur, 1998; Miranda, 1998; Gyimóthy and Johns, 2001; Brown, 2002; Johnson, 2002; Howard, 2003; RNIB and Vocalesyes, 2003; Feilden and Jokilehto, 2005; Hillis, 2005; Ambrose and Paine, 2006; de Rojas and Camarero, 2008; Weiler and Walker, 2014.)

Another important task in implementing guided tours is promoting the tour outside and inside the attraction. Information about the visits, such as schedules or starting locations, should be provided inside the attractions (Binks *et al.*, 1988), while information displayed outside the attraction should be mainly designed to attract new (or repeated) visitors. [Figure 11.1](#) summarizes the factors that should be considered in the operationalization of guided tours and that may contribute to their success, if properly managed.

## 11.4 The Implementation of Guided Tours in Portuguese Museums

The following empirical study undertaken aims to analyse the design of guided tours in a sample of Portuguese museums and to specifically examine how the factors identified in the previous section can be applicable to the operationalization of those tours.

### 11.4.1 Methodology of data collection

The study was carried out on a sample of 31 museums located in the two municipalities with the highest percentage of the 100 most visited museums in mainland Portugal: Lisbon and Porto, accounting for 23 and 8 museums, respectively (National Institute of Statistics of Portugal, 2015, unpublished data). Museums were observed and semi-structured interviews were conducted with museum managers or those responsible for implementing interpretation techniques, in order to gather information about the guided tours and some general information about the museums.

Interviews provided information on the type of museums in the study areas, which range from art museums (35%), to specialized museums (32%), history museums (13%), science and technology museums (6%), and others. There is a prevalence of public museums (65%), and the majority of these museums are directly managed by the central government (58%), foundations (19%), or the local administration (10%).

Data also shows that, although these museums are listed as the most visited in the municipalities of Lisbon and Porto, they present some differences regarding the number of visitors. On average, each museum receives about 82,400 visitors annually. However, 66% of these museums had less than 60,000 visitors, whereas only 10% had more than 200,000 visitors. According to the information provided by the managers of these museums, the great majority of visitors (72%) are Portuguese and only 28% are foreigners (all information used in this paragraph is based on the study, or has been provided directly by the museum managers).

## 11.4.2 Results and discussion

### *Guide characteristics*

All the museums organize and offer guided tours to visitors, despite having a somewhat limited number of guides: five guides on average per museum (Table 11.1). Almost a quarter of the museums (23%) only have one guide, and the majority (60%) have less than five guides; only 10% have more than ten guides.

All the guides are hired directly by the museum and they are part of the regular and/or permanent staff of the museum (Table 11.1). One museum also has guides who were previously connected to its history and activity, and more than a third of the museums draw on the services of volunteers (37%).

Regarding the knowledge and training of the guides, there are many more guides (4.3 per museum, on average) with education and training in areas related to specificities of the museums' main collection (namely history, history of art, biology, archaeology or science education) than with specific training in guiding tours (only 0.5 guides per museum, on average) (Table 11.1). Although it is positive that a third (34%) of the museums offer training programmes to their guides with some regularity (more than once a year), the majority (59%) only offer these activities on a sporadic basis (less than once a year).

In addition to the assessment procedures required by law, museums also have other measures to assess their guides' performance. A predominance of formal evaluation procedures in relation to informal procedures (only applied by 38%) is observed (Table 11.1). The most frequent formal procedure is the questionnaire survey, in which visitors are requested to evaluate several features of the attraction, including the guides' performance and the tours' quality. As far as informal measures are concerned, museums conduct informal assessments of service coordinators and informal conversations with visitors. Surprisingly, a few museums also perform a test guided tour, during which guide performance is observed and graded by museum staff.

### *Format of the guided tours*

Considering the contents and themes of the tours, the museums studied provide 2.4 types of tour on average. The majority offer two (47%) or three kinds of tours (23%). The remaining museums provide only one (17%) or four kinds of tours (17%) (Table 11.2).

The main niche markets for tours are groups of schoolchildren and teens, or organized groups (40% and 34% of the tours, respectively). Only a quarter of the tours are targeted at the general public and only a few are directed at families, elderly people and visitors with special needs.

**Table 11.1.** Recruitment, educational/training background and performance evaluation of the museum guides.

	<i>n</i>	%	Mean per museum	Standard error
<b>Number of guides</b>	30		4.7	3.9
<b>Entity responsible for hiring guides</b>				
Own museum	30	100		
Tour operator(s)	0	0		
Local tourism organization	0	0		
Other entity	0	0		
<b>Type of staff employed</b>				
Professional staff of the museum	30	100		
Volunteers	11	37		
Persons who were previously related to the museum	1	3		
Local residents	0	0		
Other	13	43		
<b>Knowledge and training of guides</b>				
Specific training or knowledge in areas related to the museum collection	30		4.3	3.4
Specific training or knowledge in guiding tours	30		0.5	1.6
<b>Frequency of participation in training actions</b>				
More than once a year	17	59		
Once a year	2	7		
Less than once a year	10	34		
<b>Performance evaluation of guides</b>				
Formal evaluation procedures	26	90		
Informal evaluation procedures	11	38		

A maximum number of participants has been set for 71 of the analysed tours, while a minimum number of participants has been set for 48 of the tours. The average minimum and maximum numbers of participants set for these tours is about 6 and 26 participants, respectively, although some variation is perceived (Table 11.2). The definition of a maximum number of visitors per group is often motivated by the need to avoid congestion in the rooms and to ensure visitors' satisfaction.

The majority of the tours (63%) only take place in indoor areas, but there are already some (37%) that occur both indoors and outdoors (Table 11.2). These outdoor locations can be the museum gardens or other locations within the destination with some connection to the exhibit. One of the museums in this study, dedicated to tramway transport,

**Table 11.2.** Format of the guided tours.

	<i>n</i>	%	Mean per visit	Standard error
<b>Number of different tours supplied in each museum</b>	30		2.4	0.9
<b>Target market of the tours</b>				
Groups of students/schoolchildren	29	40		
Organised groups	25	34		
Families	2	3		
Seniors	5	7		
Visitors with disabilities	2	3		
General public	18	25		
<b>Size of the group (defined by the museum)</b>				
Minimum size of the group	48		5.5	4.5
Maximum size of the group	71		25.6	6.1
<b>Place where the tour takes place</b>				
Only indoors	46	63		
Only outdoors	0	0		
Both indoors and outdoors	27	37		
If outdoors:				
Use of a means of transport	2	7		
<b>Frequency of the tours</b>				
Days when the tours occur				
From Monday to Friday	52	71		
On weekends	16	22		
Only in the peak season	2	3		
During events	1	1		
Only on special days	17	23		
Frequency with which the tours occur				
A timetable is previously defined	21	29		
There is no timetable previously defined	52	71		
<b>Duration of the tour</b>				
Minimum duration	24		50.8	26.8
Maximum duration	35		90	25.6
<b>Charging of a price for the guided tour</b>	13	18		



takes advantage of this transport and conducts part of the tour by tram across the city centre. This is also seen in other attractions, such as coal mines, where guided tours take place in cars for coal transportation (e.g. Gyimóthy and Johns, 2001).

The highest number of visits – more than two thirds (71%) – is registered on working days (Table 11.2). More than a fifth of the tours occur on weekends (22%) and on special days (23%). Regarding the frequency with which the tours occur, 71% of the tours do not occur at a previously defined time, as tours are usually booked according to the museum/guides' availability and the visitors' time preference. In fact, whether there are predefined schedules for the tours or not, in more than 90% of the tours previous reservation is mandatory. When a timetable is previously defined, the tours take place every hour, on average.

In only 18% of the tours a price is charged for the guided tour. For the majority of these tours (62%) there is a fixed price. However, quite a few of the tours are offered to some types of visitors at a reduced price (23% of the tours). Free tours are offered to specific visitor segments, for example members of the association of friends of the museum (23%), while other tours are offered at a reduced price in other specific conditions (15%).

Managers reported that the duration of the visits varies significantly, mainly according to the type of visitors on the tour. On average, the minimum duration of a tour is 50 minutes whereas the maximum is 90 minutes (Table 11.2). However, there is considerable variation in these indicators, with a standard error of about 25 minutes (Table 11.2). In order to analyse the characteristics of longer and shorter guided tours, and to identify possible reasons thereof, the analysed tours were first divided into groups according to their duration. A cluster analysis was used for this purpose, adopting the Ward's method and the Squared Euclidean Distance. A solution of two clusters was adopted, taking into consideration the data from the agglomeration schedule.

The group with the shortest tours is composed of 39 tours with an average duration of 57 minutes (about an hour) whereas the group with the longest tours is

**Table 11.3.** Differences between longer and shorter tours.

	Shorter tours		Longer tours		Total		Pearson Chi-square	
	<i>n</i>	%	<i>n</i>	%	<i>n</i>	%	Chi-square	<i>P</i>
<b>Place where the tour takes place</b>								
Both indoors and outdoors	9	23.08	15	53.57	24	35.82		
Only indoors	30	76.92	13	46.43	43	64.18	6.593	0.010
Total	39	100	28	100	67	100		
<b>Days when the tours occur</b>								
From Monday to Friday	26	66.67	25	89.29	51	76.12		
On weekends	13	33.33	3	10.71	16	23.88	4.587	0.029
Total	39	100	28	100	67	100		

composed of 28 tours with an average duration of 98 minutes (about an hour and a half). Bivariate analyses, including Chi-square tests, were used to identify significant differences between the two groups of tours. These analyses reveal that the duration of the tour is likely to be related to the place where the tour occurs – only indoors or also outdoors – and also to the day of the week when the tour takes place. Tours that also take place outdoors and tours that occur from Monday to Friday are likely to be longer (Table 11.3).

When analysing the flexibility of the tours, it is observed that each tour is offered, on average, in two different languages (Table 11.4). The most frequent languages in which the tours are conducted, beyond Portuguese, are English (used in 55% of the tours), French (38%) and Spanish (23%). In almost all the tours there is the possibility of adapting the kind of information provided to the visitors (97%) and visitors are allowed to choose places to stop during the tour (86%). Nevertheless, only 4% of the tours may be adapted to the usage of sign language.

As far as the depth of the experience the guided tour provides, there are various positive indicators. In the majority of cases (64% of the tours), detailed descriptions are provided when needed, and in almost half of the tours (47%), touch tours are available. Interaction between the visitors and the guide and even among the tourists themselves seems to be encouraged in the majority of tours (67%) through encouraging group discussions and monitoring group dynamics (Table 11.4).

Interest in improving the visitors' sensorial experiences is also observed in some tours, with offer of the opportunity to touch objects – original pieces or replicas – without being necessarily designed as touch tours (44%). Some tours also provide the possibility to listen to sound effects (42%) and experience simulated environments (25%). Hands-on, engaging and/or multisensory experiences are given a strong emphasis in the science and technology-driven museums studied. Light, sound, smoke or water effects, motion- or self-activated, are some of the most frequent sensory experiences offered. In order to protect fragile objects, some museums display replicas of sculptures, carvings, fossils and artefacts (e.g. jewellery, ceramics, weapons) made of different materials and with different textures, so that the experience can be improved by touching them. Some original items, such as geological samples, are also used when suitable. The majority of museums in the study even have rooms specifically dedicated to these multisensory experiences and other educational activities. This is visible, for example, in a museum devoted to the Portuguese legacy of decorative glazed tiles, where the visitors are allowed to explore textures and patterns and to create their own tiles. Another interesting example is the museum dedicated to the press, where the visitors have the opportunity to produce and print documents using original tools and equipment. However, these kinds of opportunities are not extended to all museums. There is limited offer of smell and taste experiences within museums. Only two tours offer experiences that appeal to the sense of smell and none of the tours involve tasting elements.

Although interpretation techniques may be designed and operationalized in a combined manner, this is not widely used in the tours analysed. Guided tours are most frequently combined with the provision of printed information (in 41% of the tours), followed by demonstrations and the supply of information in Braille (both used in 16% of the tours) and historical recreations (12%) (Table 11.4). Guided tours are also frequently (in 45% of the cases) combined with other techniques specifically

**Table 11.4.** Flexibility and scope of the tours.

	<i>n</i>	%	Mean per visit	Standard error
<b>Flexibility of the tour</b>				
Number of idioms spoken in tours	73		2.2	1.2
Idioms spoken				
Portuguese	73	100		
English	40	55		
French	28	38		
Spanish	17	23		
German	1	1		
Possibility of choosing when to stop	63	86		
Possibility to answer questions and requests of the visitors	73	100		
Possibility of adapting the kind of language used	73	100		
Possibility of adapting the kind of information provided	71	97		
Provision of explanations in sign languages	3	4		
<b>Depth of the experience of the tour</b>				
Possibility of touching objects	32	44		
Possibility of smelling specific odours	2	3		
Possibility of tasting specific substances	0	0		
Possibility of hearing sound effects	31	42		
Simulating environments with visual effects	18	25		
Promoting group dynamics and interaction with visitors	49	67		
Detailed description of resources/objects	47	64		
Touch tours	34	47		
<b>Combination with other interpretation techniques</b>				
Historical recreations and representations	9	12		
Demonstrations	12	16		
Providing information in printed material	30	41		
Providing information in Braille	12	16		
Other	33	45		

designed for school groups (e.g. games, workshops, viewing films, reading sessions, small concerts). In some museums that relate to traditional costumes and theatre, historical representations and theatrical performances are frequently organized to create more satisfying visitor experiences.

Although 80% of the museums promote their guided tours outside museum premises to the general public, it is concerning that only about a quarter of the museums

**Table 11.5.** Promotion of guided tours.

	<i>n</i>	%
<b>Place where the tours are promoted</b>		
Outside the museum	24	80
In the premises of the museum	8	27
<b>Type of information provided about the tour inside the museum</b>		
Timetables	6	75
Place where the visit starts	2	25
Idioms in which the tour is available	2	25
Maximum and minimum number of participants	3	38
Duration	3	38
Price	6	75
Types/thematics of tours available	5	63
Prior reservation required	1	13
Other kinds of information	2	25

(27%) provide this kind of information on museum premises. This could mean that some visitors may not participate in a guided tour because they ignore its existence or do not have enough information about it. Most of the information found inside the museums is related to timetables (provided by 75% of the museums that make information available inside the museum), price (75%) and type of available tour (63%).

### 11.4.3 Conclusions and implications

The interpretation provided through guided tours can have a crucial role in creating positive museum experiences and increasing future visitation to destinations. This study provides a relevant contribution to literature by identifying an extensive list of factors that should be considered when operationalizing guided tours, in order to design appealing guided tours in museums. These factors range from features related to guides – including knowledge, training and performance appraisal – to a wide variety of features related to tours – encompassing the number, frequency, target market, limits to group size, price, flexibility and customization, as well as tours' sensory appeal.

The empirical research on guided tours offered by the most visited museums in Lisbon and Porto provides important insights into how to increase the success of guided tours in museums. First, this research highlights the existence of some effort to ensure variety among the museums' guided tours, namely regarding themes. Thematic approaches seem to be a clear bet for most museums, especially on special dates and events, when high visitor numbers are expected. One of these occasions is International Museum Day, when several special tours and complementary activities are offered.

Another positive factor is the high accessibility of tours with regards to price, as most of the guided tours in this study are free of charge. Guided tours' features identified as being of utmost importance are the high flexibility and customization of the tours (Weiler and Walker, 2014). Some features are particularly important to the visitor experience; for example, the kind of information provided that is adjusted to the interests and receptivity of the audience, and the language and level of detail in the explanation provided to visitors. However, this research also suggests the need to not only restrict the tours' customization to some of the important museum audiences – e.g. school groups and families – but to also extend these strategies to other market segments. Offering more visits at weekends and increasing the number of languages in which the tours are offered are recommended. Considering that most of the guided tours identified require prior reservation, more effort can be made in order to customize some features of the tours based on the characteristics and interests of each group. Making the tours more accessible and appealing to visitors with special needs, elderly people and families would also be a relevant measure, since only a few museums involved in this study offer such tours.

According to the literature, the provision of engaging guided tours that promote active and deep contact with the place visited and with other people and that encourage the extension of knowledge, going beyond usual thoughts and experiences, are crucial to the success of interpretation in museum guided tours. This is because such tours enable visitors to have enriching multisensory experiences, to explore different places (e.g. outdoor areas) and to raise rewarding emotions (Jonasson and Scherle, 2012; Weiler and Walker, 2014; Huang *et al.*, 2015). Although some of these principles have already been implemented in some of the museums studied here, the following recommendations are made: (i) a greater emphasis should be put on multi-approach interpretation, by promoting a greater combination of guided tours with other interpretation techniques; (ii) a more multisensory experience can be created by creating taste and smell experiences, that are currently scarce; and (iii) unexplored settings, such as outdoor environments can be included in guided tours.

Considering that guided tours are a personal technique of interpretation, as advocated in the literature (Weiler and Walker, 2014), the educational background and training of guides is extremely important. In this scope, this research's findings suggest that it is very important to increase training of museum guides, not only to enable them to offer multidisciplinary interpretation perspectives, which are of great value (Jonasson and Scherle, 2012), but also to provide guides with the knowledge and skills required to successfully communicate with visitors. The direct contractual tie that most of the guides have with the museums may facilitate this objective's achievement.

More in-depth and comprehensive studies are required, comprising a wider number and typology of museum samples in order to enable comparative analysis. Future studies should analyse more specifically the efficiency of these strategies and identify those that may be more appropriate for market segments with different needs. This kind of research is extremely important in providing a deeper understanding of how the interpretation offered in guided tours may create more satisfying and memorable museum experiences.

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# 12 Using Heritage Interpretation to Manage Film-induced Tourism at Heritage Visitor Attractions

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## 12.1 Introduction

Heritage visitor attractions (HVAs) increasingly find themselves under external and internal environmental operating pressures (Leask *et al.*, 2013b) and face increasing competition from other leisure and visitor attractions (Leask, 2010). Thus visitors' expectations and experiences have become crucial challenges for managers at HVAs, where they have started to play a significant role in visitor management (VM) practice (Poria *et al.*, 2009; Chen and Chen, 2010). This is especially so for HVAs that have been further popularized through involvement in film-induced tourism. Film-induced tourism, which can be perceived to be a subcategory of pop culture tourism (Gyimóthy *et al.*, 2015), can also be a form of heritage tourism (Hoppen *et al.*, 2014; Martin-Jones, 2014), especially given the fact that films inspire visitation to a wide range of sites, including heritage sites. In this context, film-induced tourism is increasingly becoming visible at HVAs and can be a major factor influencing a significant rise in visitor numbers, in changing visitors' expectations and in their consumption of particular heritage sites. However, due to their nature, HVAs tend to rely on fragile and often irreplaceable resources, thus resulting in potential tension between resource protection and commercial goals.

Despite the richness of existing research surrounding the phenomenon of film-induced tourism, and the fact that some of the existing studies are, to some extent, concerned with heritage tourism (e.g. see Schofield, 1996; Winter, 2002; Frost, 2006; Månsson, 2011; Pan and Ryan, 2011; Tzanelli, 2013), it could be argued that previous studies did not sufficiently explore the management challenges at HVAs. Specifically, a lack of explicit consideration of the role of heritage interpretation as a tool that can be used to address a range of VM challenges at such sites, is suggested. With this in mind, this chapter provides a greater understanding of the potential

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value of heritage interpretation in the context of addressing a range of potential VM challenges at HVAs where film-induced tourism has occurred. Its empirical discussions explore management challenges at one such HVA, Alnwick Castle in the UK, and pay particular attention to (post-film exposure) visitors' expectations and the influence these have had on heritage interpretation at the site. The chapter argues that, in the context of film-induced tourism at HVAs, heritage interpretation can be a particularly valuable VM tool and one which is increasingly considered to be an essential part of the overall quality of visitors' experiences (Moscardo and Ballantyne, 2008).

## 12.2 Literature Review

### 12.2.1 The film-induced tourism phenomenon

Film is an integral element of our culture (Urry and Larsen, 2011) and has the power to create images that attract the audience and create a pull to potential destinations (Took and Baker, 1996; Beeton, 2001; Busby and Klug, 2001; Bolan and Williams, 2008). Rewtrakunphaiboon (2009) argues that film images attract people to the scenery and landscapes of lesser known locations, while the stories, themes, events and actors in films create a particular feeling, sentiment and viewpoint of the places visited. Travelling to locations featured in films, television or cinema has become a global phenomenon creating a tourism niche known as film-induced tourism (e.g. see Beeton, 2005; O'Connor *et al.*, 2008; Macionis and Sparks, 2009). Film-induced tourism however is not just about visits to places that featured on television, video or the cinema screen; both Beeton (2005) and Connell (2012) argue that the definition of film-induced tourism is more complex because it is multidimensional, involving multiple media formats and outlets.

While films can induce visitation at a wide variety of sites, in the context of film-induced tourism at heritage sites, Busby and Klug (2001) indicate that some heritage sites have become popular solely because they featured in a film, as this distinguishes them from other historic buildings. Indeed, recently, films such as *A Knight's Tale*, *The Da Vinci Code*, the series of *Harry Potter* films, *Alice in Wonderland*, *Pirates of the Caribbean* and *Brave* have increased visits to a number of HVAs in the UK, including the National Wallace Monument, Rosslyn Chapel, Alnwick Castle, Antony House, the Old Royal Naval College and Dunnottar Castle, respectively. This highlights the fact that representation of places, including heritage sites, in popular films has an important role in constructing and forming tourism spaces, raising awareness and making these emblematic attractions (Kim and O'Connor, 2011).

In addition, film-induced tourism that takes place at HVAs exemplifies the postmodern experience of place (Shofield, 1996; Leotta, 2011), since visitors do not solely seek to see the film location but also to experience it (Tooke and Baker, 1996; Kim, 2012). It is in this context that Macionis (2004) defines film-induced tourism as a postmodern trend of experiencing sites and locations featured in popular media products. Based on this understanding, the studies of film-induced tourism have recently shifted from focusing on economic aspects of film-induced tourism related to visitor numbers (Riley and Van Doren, 1992; Tooke and Baker, 1996; Riley *et al.*, 1998) to more recent explorations of the intricacies of visitors' expectations,

experiences, interactions and construction of place, often drawing on a variety of disciplines and fields of studies such as sociology, anthropology, cultural geography, film, as well as language studies (e.g. see Couldry and McCarthy, 2004; Carl *et al.*, 2007; Kim, 2010, Hao and Ryan, 2013; Martin-Jones, 2014).

### 12.2.2 Visitor management challenges at heritage visitor attractions

The challenges of VM at HVAs are increasingly explored where sites are either under threat, undermined or considerably neglected (e.g. see Jordan, 2013; Dueholm and Smed, 2014; Irimiás, 2014). Shackley (2009, p. 13) argues that VM has become 'a new and as yet inexact science which aims to balance the needs and requirements of the visitor with the potential impact that the visitor may have on fragile buildings or artefacts'. These dilemmas result from the exposure of sites to visitors, which, if uncontrolled and ineffectively managed, bring negative visitor impacts (Swarbrooke and Page, 2012). These issues of VM are linked to a complex relationship between heritage management and tourism (Garrod and Fyall, 2000; Ho and McKercher, 2004; Fyall and Rakić, 2006; Wang and Bramwell, 2012; Ahmad, 2013; Zhang *et al.*, 2015). In some instances there is an evident lack of understanding of this relationship on behalf of heritage managers, with the inevitable result being that some managers fail to sufficiently acknowledge the fact that the HVAs they are managing need to operate within the wider tourism industry (Croft, 1994; Darlow *et al.*, 2012). Conversely, tourism operators may not respect heritage assets, seeing these solely as a profit-generating opportunity (McKercher, *et al.*, 2005).

Finding a balance between visitor access, conservation and protection of the resources is an important challenge that managers face at HVAs (Carter and Grimwade, 1997; Timothy and Boyd, 2003; Li *et al.*, 2008). Some managers, with a strictly curatorial imperative, consider themselves more as guardians of heritage rather than providers of access to heritage, which means that 'public access is not a prominent part of management consideration' (Garrod and Fyall, 2000, p. 684). Thus, some managers put a strong emphasis on preservation, without necessarily taking into account the site's contemporary purpose (Smith, 1999; Grimwade and Carter, 2000; Timothy and Boyd, 2006) or the changing profile and expectations of visitors (Sheng and Chen, 2012; Massara and Severino, 2013; Leask *et al.*, 2013a). However, it is argued that access to HVAs should not only be about accommodating visitor numbers, but also about accommodating a range of visitor groups and profiles and their expectations (Leask *et al.*, 2013a).

Access restrictions at HVAs are often a response to an increase in visitor numbers, which has resulted from a range of demographic, social and cultural developments (Gunduz and Erdem, 2010). In some instances, phenomena such as film-induced tourism has also contributed to increased visitor numbers at HVAs, with associated management concerns at some sites (Took and Baker, 1996; Busby and Klug, 2001; Connell, 2012). Increased visitor numbers, irrespective of the cause, may result in a number of issues, including congestion and overcrowding (Cochrane and Tapper, 2008; Santana-Jiménez and Hernández 2011).

Visitor management challenges are also related to managing visitor expectations, an integral part of tourism (Skinner and Theodossopoulos, 2011). The representation

of a specific location or place though popular film and media may influence visitors' expectations of what can be experienced during an actual visit (Beeton, 2005; Connell, 2012; Kim, 2012). As a result, visitors are likely to perceive the places as they remember them from media exposure (Beeton, 2005). Urry (2002) and Beeton (2005), for example, both argue that places that featured in a film and are, as a consequence, visited do not usually live up to visitors' expectations. In these cases, visitors' expectations tend to be based primarily on their understandings and imaginings of the place as represented in film(s), which in turn contributes to the creation of mediated perceptions of that place that influences the experience when visited (Beeton, 2001; O'Connor *et al.*, 2010; Lester and Scarles, 2013). Thus, a failure to acknowledge the imagined, fictional and multidimensional contemporary meanings of heritage sites that became popular HVAs as a result of their exposure through popular film(s), is likely to result in unsatisfactory visitors' encounters and engagement with those sites, and also in ineffective management of the actual site (Winter, 2002; Kim, 2012).

### 12.2.3 Heritage interpretation as a visitor management tool

Heritage interpretation can be a particularly effective VM tool, used not only to communicate information about heritage resources and to transfer value and knowledge about the site (Howard, 2003; Hughes *et al.*, 2013), but also to manage visitors at the site (Saipradist and Staiff, 2008; Imon *et al.*, 2011). Indeed, interpretation is commonly used at HVAs to help meet learning, behavioural and emotional objectives (Veverka, 2013). As a management tool, interpretation can raise the awareness and understanding of heritage values and the need for protection (Beckmann, 1999; Saipradist and Staiff, 2008). This can result in an increase in the perceived value of HVAs and may have practical consequences such as reducing litter and vandalism, or broader implications through becoming the cornerstones in regional heritage tourism programmes (Veverka, 2013).

Interpretation can also serve as a tool to deal with management issues such as orientation, visitor flow and safety concerns (Aplin, 2002). Managers use interpretation to help visitors find their way around the site easily so they can organize their visit, feel comfortable and, at the same time, enjoy the interpretive experience (Moscardo and Ballantyne, 2008). Interpretation also serves as a tool that engages visitors with the site, so they are willing to absorb information and contemplate the environment and the resources, which, in turn, will enrich their experience (Sutcliffe and Kim, 2014). Through the employment of interpretation as a management tool, managers can add value to heritage tourism products, encourage visitors to stay longer at the attraction and help promote 'sustainable visitor behaviour on and off the site' (Pearce *et al.*, 1998, p. 266). Indeed, interpretation as a management tool is used to promote sustainable management messages among visitors (Moscardo and Ballantyne, 2008) and to encourage them to support sustainable management practices (Lee and Moscardo, 2005).

Heritage interpretation can help prevent visitor disappointment that might result from prior knowledge and expectations (Beckmann, 1999). Indeed, managers can effectively use interpretation as a tool to manage visitor expectations which, in turn, improves the quality of service and visitor satisfaction (Archer and Wearing,

2002). Recent research shows that interpretation based on new technologies helps in exceeding visitors' needs and expectations (Leask *et al.*, 2013a). Indeed, interpretation based on digital media increasingly plays a significant role in heritage management practices (Affleck and Kvan, 2008) and managers of HVAs are aware of the significance of employing new innovative technologies in managing visitor needs, expectations and experiences, in addition to the traditional means of heritage interpretation (Leask *et al.*, 2013a; Dueholm and Smed, 2014).

## 12.3 Methods

The empirical study discussed in this chapter is underpinned by a constructivist paradigm. Due to the nature of this particular approach, this study is based on qualitative semi-structured interviews with managers, guides and visitors at Alnwick Castle conducted over 3 weeks during August 2013. Alnwick Castle was a particularly suitable location as it is an HVA that served as a backdrop for various films and television series, including the first two *Harry Potter* films, and whose popularity subsequently increased among film tourists.

Based on theoretical sampling, the lead author interviewed the director, three managers (the marketing manager, the interpretation manager, the visitor services manager) and three guides, who provide various guided tours at Alnwick Castle. In addition, 30 semi-structured interviews with British and international visitors at Alnwick Castle were conducted to provide greater insights into their expectations.

## 12.4 Results

### 12.4.1 An increase in visitor numbers

As discussed in the literature review, an increase in visitor numbers creates a dilemma for the management of HVAs. Increased visitor numbers at Alnwick Castle resulted from the site's exposure in the *Harry Potter* films. According to the director of Alnwick Castle, since the films, visitor numbers increased significantly over a short period of time from 50,000–60,000 in 2001 up to 300,000 in 2003. Interestingly, even though the castle served as a backdrop in only the first two films, every time a new *Harry Potter* film was released there was a slight increase in visitor numbers, renewing and sustaining interest in the castle.

However, according to the director and managers of Alnwick Castle, they did not experience any major negative management issues as a result of the sudden increase in visitor numbers. This was due to the fact that the management team was experienced and able to quickly adjust to the new situation by developing tools and facilities to manage visitor flow more effectively. In addition, as the site had featured in various films and television series prior to *Harry Potter*, they had previous experience of dealing with other media products and thus were familiar with the phenomenon of film-induced tourism, and to some extent they had expected this increase in visitor numbers.

However, the director did indicate that occasionally the site experiences issues resulting from the increased visitor numbers. During the high season, especially in July and August, the site receives around 3500 visitors a day, a manageable amount according to the director. However, there are some situations when visitor impacts affect the site and the overall visitor experience and satisfaction. For example, it was found that, although visitor flow is managed in an effective way, the site occasionally experiences unexpected overcrowding that results in visitor dissatisfaction. The visitor services manager indicates that overcrowding is often caused by inclement weather conditions and tends to be focused on a specific area and not the whole site. Any lack of overcrowding is also due to the fact that Alnwick Castle is a large site with huge grounds and a range of activities. Thus the site experienced fluctuating congestion rather than permanent or continuous overcrowding, which did not put substantial pressure on fragile resources and did not cause major environmental issues.

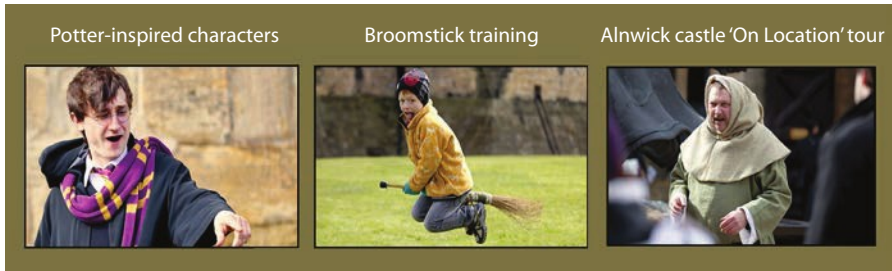
#### 12.4.2 The influence of visitors' expectations on heritage interpretation

Visible VM challenges related to visitors' expectations of the site that affected heritage interpretation. Interviews with managers and guides at Alnwick Castle has revealed that the global phenomenon of the *Harry Potter* franchise has had a significant impact on visitor expectations of Alnwick Castle. While understandable, this became an issue for heritage interpretation, with visitors continually asking questions related to the films. This confirms that *Harry Potter* still mediated and informed visitors' expectations of the site and was confirmed during visitor interviews. Indeed, when asked about their expectations, many visitors regularly mentioned the *Harry Potter* films, highlighting the fact that these informed their prior expectations of what they would experience at the castle during their visit. Many visitors believed that they would see the interior of Hogwarts (the fictional school featured in all *Harry Potter* films) when, in fact, Alnwick Castle's interiors were never used in any of the scenes featuring Hogwarts.

As demonstrated, the *Harry Potter* films influenced visitor expectations and in response management implemented a new strategy to address the expectations of those visitors who came as a consequence of the films. As revealed through the interviews with managers, prior to the release of the *Harry Potter* films Alnwick Castle was interpreted in a traditional way, mainly based on historical information about the castle. Due to the increase in visitor numbers and their expectations, it has had to adapt. Aware of the *Harry Potter* success and of the power of film in creating strong perceptions and expectations, the managers decided to develop new heritage interpretation based more on entertainment and the *Harry Potter* films rather than keeping interpretation solely rooted in the castle's history (Fig. 12.1).

In addition, the Alnwick Castle brochure cover has been changed from an image of the medieval nobleman Harry Hotspur to an image featuring the fictional *Harry Potter* characters. The use of Alnwick Castle in the *Harry Potter* films is now also included in the overall historical timeline, which is presented on the main wall of the exterior of the castle.

According to the heritage interpretation manager, interpretation had to be expanded and modified to include *Harry Potter* in the overall offering; otherwise the



**Fig. 12.1.** *Harry Potter*-inspired interpretation. (From Alnwick Castle website, 2013.)

site would have quickly lost visitors who, although not interested in visiting medieval castles, decided to visit the site due to the *Harry Potter* connection. The managers took the strategic decision to customize the heritage interpretation to suit visitors whose expectations were influenced by the films. However, the marketing manager stated that this new approach was not appreciated by all visitors and it was suggested that some did not wish the castle to be associated with a fictional children's film. Managers were concerned with losing visitors who were not interested in the *Harry Potter* relationship and found that trying to appeal to a diverse audience became difficult. Fulfilling different visitors' expectations became a dilemma as managers struggled to meet the diverse range of visitor needs and expectations, while finding the right balance between the castle's history, the *Harry Potter* world and the delivery of satisfying visitor experiences.

### 12.4.3 Addressing visitor management challenges at Alnwick Castle through heritage interpretation

Interviews with managers, guides and visitors suggested that, although the new heritage interpretation methods inspired by the *Harry Potter* films were not always appreciated by all visitors, the introduction of such an approach potentially could make a contribution to the overall improvement of VM. The new *Harry Potter*-inspired interpretation allowed different areas of the castle to develop, which had the effect of minimizing both pressure on the interior of the castle and the overcrowding issue. Both the *Harry Potter*-inspired characters and 'Broomstick Training' were located outside, in an area called the Inner Bailey, while 'Knight's Quest' and 'Dragon Quest' took place in the Outer Bailey, which helped to distribute visitors into different areas, ensuring that areas with more fragile resources, such as the state rooms, were not overloaded.

Newly developed and themed signs and information boards also served as a tool to manage visitor flow and to help visitors with orientation, while at the same time assisting with the safety of the visitors. Information boards (Fig. 12.2) helped visitors to organize their visit more effectively and encouraged engagement with interpretation, which, in turn, added value to their visit and allowed them to appreciate the site as a significant and valuable place. Visitors to Alnwick Castle are clearly shown what services and events are available throughout the day and are encouraged to take photographs of the information board in order to avoid missing anything. Indeed, the





**Fig. 12.2.** Information boards. (Photo courtesy of J. Bakiewicz, August 2013.)

director of Alnwick Castle stated that the combination of new interpretation methods, a proactive approach to managing the visitor experience and the use of informative and appropriate signage has significantly reduced the number of visitor complaints.

Managers at Alnwick Castle ensure that visitors are well informed about on-site events, activities and interpretation methods, which also helps prevent visitor complaints and disappointment. There are also information boards that inform visitors of certain rules and behaviours (Fig. 12.3). The tone of the messages on the boards is such that visitors do not really feel that they are being told how to behave or what they can or cannot do. Instead, careful consideration has been given to the design of interpretation boards so that they match the castle's atmosphere, and visitors are informed about these rules and expected behaviours in a humorous and relaxed way.

As a means of addressing the expectations of visitors who have been influenced by the *Harry Potter* films, Alnwick Castle has designed the 'Battleaxe to Broomsticks Tour'. During this tour, visitors learn about the making of the films while the guide clarifies what was filmed at the site, what was CGI (Computer Generated Imagery) and what was filmed in the studio. The guides take visitors around the grounds showing them the places featured in the films such as: the entrance of Hogwarts; the Holly Bush located outside the gate to Hogwarts; the location of the Whomping Willow, which was digitally incorporated into the castle landscape; the location where Hagrid drags a Christmas tree across the courtyard; and the location where broomstick training took place. This is conducted in a very informal and humorous manner so that instead of being disappointed that Alnwick Castle does not look like Hogwarts, visitors are happy that they can learn secrets from behind the scenes. However, this particular tour is not solely based on the fictional world of *Harry Potter* and guides incorporate historical fact in between the talk of films and fictional characters. This integration of the castle's history and the *Harry Potter* films is one of the ways in which the castle actively engages with different types of audience; thus enriching their experiences and providing a better understanding of the value and significance of the castle at the same time. It could therefore be argued that through effective heritage interpretation, the management of Alnwick Castle are ensuring that when visitors leave the site they not only appreciate the site as a film location but also





**Fig. 12.3.** Visitor 'proclamation' signs. (Photo courtesy of J. Bakiewicz, August 2013.)



**Fig. 12.4.** Heritage interpretation based on history, Alnwick Castle. (Photos courtesy of J. Bakiewicz, August 2013.)

as a historically significant medieval castle. The incorporation of historical elements during the *Harry Potter* guided tour is key to achieving a balance between the historical significance of the castle and the magical world of *Harry Potter*. This balance is also achieved by implementing interpretation based solely on the castle's history, such as historical guided tours of the grounds and interior, information boards showing the historical timeline, on-site museums and historical guidebooks available in the gift shop and state rooms – as illustrated in Fig. 12.4.

It could be suggested that the *Harry Potter* films have had a significant influence on the heritage interpretation at Alnwick Castle. However, although managers modified the interpretation to include magical aspects from *Harry Potter*, they did not want the castle's history to be overshadowed by this association. So, they placed great emphasis on the castle's history in the overall interpretation. Through the combination of heritage interpretation based on entertainment with some historical elements, and interpretation based purely on history, managers aimed to achieve a balance, enriching visitors' experiences and improving their understanding of the site, so that visitors appreciate the site not only as a film location but also as a site with over 700 years of rich history.

## 12.5 Conclusions

Although the phenomenon of film-induced tourism is widely acknowledged, its impact on heritage interpretation has been overlooked. This chapter provides a greater understanding of the potential of heritage interpretation in addressing VM challenges specific to HVAs where film-induced tourism occurs, using some key findings from an empirical study at film tourism site Alnwick Castle as a basis. It identifies different heritage management challenges resulting from film-induced tourism. It subsequently explores the management strategies that were developed in the context of heritage interpretation at the site.

The chapter reveals that heritage interpretation can be a particularly valuable VM tool, especially in the context of managing issues resulting from HVA representations in media products. In addition, it has demonstrated that proactive management strategies involving implementing changes in heritage interpretation can play a crucial role in enriching visitor experiences at HVAs whose popularity has increased following exposure through popular media products. As demonstrated in this chapter, when effectively managed, heritage interpretation can successfully mitigate some of the key impacts of film-induced tourism; not only those related to high visitor numbers and any consequent overcrowding, but also visitors' mediated perceptions of the site, unrealistic expectations and lack of satisfaction. Thus, for HVAs of a similar nature, interpretation can and should be considered as a potentially effective and valuable tool not only in the context of VM issues that might have resulted from the site's exposure in media products, but also in the context of aiming to maximize the benefits of film-induced tourism at the site. In particular, heritage interpretation at HVAs that have become popular among film tourists might prove to be an ideal tool to be used in order to add value to a heritage site visit, attract younger audiences and families, enrich visitors' experiences, manage their expectations, and enhance their understanding of the historical value and significance of the site.

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# 13 Theories of Learning and their Application in Interpretation

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## 13.1 Introduction

Learning is not confined to a formal classroom setting; rather, human beings learn constantly (Kolb, 1984; Falk and Dierking, 2000), be it learning how to use a new gadget such as mobile phones or how to navigate an unfamiliar environment. We learn using different senses and in many different ways. For example, we watch how others swipe a tablet or mobile phone screen and we follow suit (learning from observation); youngsters get burned from touching naked flames and soon learn not to repeat it (learning from experience and conditioning learning). Learning that takes place in a formal classroom is just a fraction of one's lifetime learning; on the other hand, learning that occurs outside of the formal educational settings deserves notice as it can have profound influence on an individual's knowledge base, formation of attitudes and behaviour. Many tourism attractions such as museums, historical buildings, protected areas, botanic gardens, zoos and aquariums can be settings for learning. In addition, museums and other cultural institutions have played a role in the provision of knowledge and have been important places for learning. Historical buildings and monuments and protected areas such as national parks also provide opportunities for learning, as evidenced in the plethora of interpretation programmes and guided activities they offer. Most visitors come to these places out of choice, as opposed to the majority of the learning that takes place in formal settings such as obligatory schools and other educational institutions. Although the majority of visitors come to these tourism attractions for the main purpose of leisure and recreation, this does not prevent these places from offering an educational yet fun experience to visitors.

Interpretation is used in many tourism attractions to provide visitors with a safe, informative, educational yet entertaining and fun experience. It is common to see visitors looking at displays or exhibits, reading labels, listening to an audio guide or

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participating in guided activities; it is also normal to observe visitors engaging and interacting with other visitors, chatting about what they have come to see and their visit experience. The effects of such learning are difficult to gauge or measure as, unlike in formal learning at schools or other educational institutions where assessments are administered to test what students have learned, in these tourism attractions such assessment does not apply. Research findings indicate visitors learn from their visits and report increased knowledge and reinforced comprehension (Falk and Dierking, 2000). In addition, many schools and higher education institutions organize field trips and it has been suggested that effective learning comes about when field trips are incorporated into the educational curriculum (Falk and Dierking, 2000).

This chapter explores how theories of learning and behavioural changes may be applicable in interpretation, with the main focus on outdoor tourism destinations such as protected areas. Nevertheless, these theories of learning are equally applicable to the design and delivery of interpretation in museums and galleries.

## 13.2 Tourism and Protected Areas

Tourism and recreation in most protected areas are allowed and encouraged to a greater or lesser extent. In industrialized countries, national parks and other types of protected areas play an important role in providing citizens with a place to get closer to nature and spiritual qualities. Tourism in protected areas has increased steadily in the past century (Eagles, 2007). From the early establishment of national parks in the USA to the present, tourism in these protected areas has been considered an integral element to these systems, providing opportunities for relaxation and outdoor recreational activities, and is also considered a useful source of income (Butler and Boyd, 2000; Dearden, 2000; Frost and Hall, 2009; Hall and Frost, 2009). However, the relationship between conservation and tourism or other forms of resource utilization in protected areas generates unease or discomfort among different stakeholders.

One misconception about conservation in protected areas is that resources will be protected by restricting visitor access or all forms of economic activities. Banning visitor access or economic activity does not necessarily enhance resource conservation and management in many tourism destinations. This approach also disregards the role humans have played in the shaping of the landscape over the millennia, or the livelihood of the people residing in or around protected areas. Many forms of economic activity, such as mining, commercial fishing and farming, have been drastically limited or banned after an area is declared as a protected area, and tourism becomes the alternative source of income for the local communities living in or near these areas. Moreover, in an era where public funding is more constrained, it has become inevitable and necessary to allow increased tourism development in protected areas. In other words, these protected areas now have to pay for themselves (Butler and Boyd, 2000; Hall and Frost, 2009). Access to protected areas not only generates income to the managing agencies of the sites, but a positive visit experience has also been suggested as generating emotional affinity towards nature and culture, which leads to nature-protective behaviour (Kals *et al.*, 1999). Forestell (1993) also suggests that a strong connection with nature is necessary in order for people to understand the consequences of misuse and abuse of resources. This is equally applicable to cultural resources.



Tourism and resource conservation in protected areas hinges on successful interpretation as an integral part of effective visitor management (VM) (Tilden, 1977; Roggenbuck, 1992; Newsome *et al.*, 2013). Aside from appropriate planning for tourism development, a critical element to wise utilization of tourism resources in protected areas is the effective management of visitors' on-site behaviour, which should be appropriate and sensitive to the characteristics of the destination (Orams, 1994; Moscardo, 1996, 1999, 2003; Orams 1996a, b; Beck and Cable, 2002; Ballantyne *et al.*, 2007, 2011). Moreover, interpretation is not merely an impact management tool; its crucial role is in its potential as an agent for education, whereby visitors learn from their visits (Tilden, 1977; Newsome *et al.*, 2013).

### 13.3 Principles of Interpretation

Visitor management aims to provide visitors with high standards and safe visit experiences and contribute to the management, maintenance and protection of tourism resources (Hall and McArthur, 1996; Marion and Reid, 2007); it also seeks to influence the extent of visitor use, type of activity, timing and distribution of visit and to manage visitor behaviour (Tubb, 2003; Newsome *et al.*, 2013). Visitor management involves different methods, and interpretation is one such method often praised for its role in informing and educating visitors. Freeman Tilden's work *Interpreting Our Heritage*, although first published in 1957, remains a classic to practitioners providing interpretation services as well as to students and academics conducting research in interpretation and park management. Tilden (1977, p. 8) defines the function of interpretation 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'. There are other definitions of interpretation but they are similar in terms of the educational and informative role interpretation plays in a tourism setting (see also Knudson *et al.*, 1995; Moscardo, 2000; Weiler and Ham, 2001). In addition, Tilden commented that in the Park Service Administrative Manual there was the statement 'Through interpretation, understanding; through understanding, appreciation; through appreciation, protection' (Tilden, 1977, p. 38). Although the relationship between interpretation, understanding, appreciation and protection is neither necessarily a linear one, nor conclusive (Munro *et al.*, 2008), it is evident that interpretation is an important element in VM and can assist a tourism destination, especially a protected area, to achieve its goals of resource management and conservation while offering an informative, educational and fun visit experience.

The principle of interpretation is rooted in effective persuasive communication between site managing agencies and visitors, and an understanding of how people learn and how desirable visitor behaviour or, at least, behavioural intentions, can be stimulated. Tilden's (1977) six principles of interpretation, echoed by Beck and Cable (2002), inform why an understanding of persuasive communication and theories of learning and behavioural changes is the bedrock to effective interpretation and environmental education programmes in protected areas. Hence, the research into interpretation should start with relevant elements of persuasive communication (Ajzen, 1992; Piesssené, 1999) and theories in learning and behavioural changes.

It is important to note that measuring changes in behaviour requires longitudinal research and these changes may result from a host of complex factors. Instead, most research focuses on identifying changes in behavioural intentions or attitudes as indicators to changes in behaviour itself (Ajzen and Fishbein, 1980; Ajzen, 1988).

Visitors are non-captive, as opposed to classroom students (Hammit, 1984; Ham, 1992), and the learning that takes place during their visit to a tourism destination is of their free choice (Falk and Dierking, 2000). If the interpretation programme does not arouse visitors' interests, it does not retain visitors' attention. Thus, firstly the visitors' attention needs to be captured and retained; secondly, the interpretation programme should aim to stimulate and promote further and deeper learning as well as reflective thinking (see also Kolb, 1984; Moscardo, 1996, 1999, 2003; Stewart *et al.*, 1998; Falk and Dierking, 2000; Schänzel and McIntosh, 2000; Ballantyne *et al.*, 2007, 2011; Marion and Reid, 2007). Tilden's idea of provocation aspires to using interpretation to stimulate 'a desire to widen his horizon of interests and knowledge, and to gain an understanding of the greater truths that lie behind any statements of fact' (1977, p. 33). Knudson *et al.* (1995) also concur such an evocation. Communication of mere factual information or instructions such as the dos and don'ts is insufficient for effective interpretation. In order to capture the attention of non-captive, free choice-learning visitors, to arouse their interests during their visit and to stimulate or create an opportunity for visitors to develop their knowledge and understanding, effective interpretation needs to be more than a didactic, instructive style of education. The key issue is how to provoke visitors and successfully persuade them to be willing and to want to adopt pro-environment behaviour. Creating and promoting emotions such as affection, care, ownership and pride towards the resources in order to foster environmentally friendly behavioural intentions during their visits to national parks or protected areas have been advocated (Marion and Reid, 2007; Schänzel and McIntosh, 2000; Orr, 2004). Although there is a danger in assuming that increased knowledge will automatically lead to immediate changes in behaviour (Kolb, 1984; Hines *et al.*, 1986; Hungerford and Volk, 1990; Cachelin *et al.*, 2009), knowledge is usually a prerequisite for behavioural changes to occur and be retained.

### **13.4 Interpretation, Emotions, Affective Domain and Cognitive Learning**

Since the main objective of interpretation is to educate visitors, it is necessary to look into how visitors learn and how to promote appropriate visit behaviour during their time at a tourism destination. Researchers in North America, Australia and New Zealand have systemically identified that an understanding of cognitive learning, emotions and the affective domain is essential in designing an effective interpretation programme that not only enhances visitors' knowledge but may also promote and persuade their willingness to modify undesirable behaviour (Eiss and Harbeck, 1969; Iozzi, 1989; Hungerford and Volk, 1990; Orams, 1994, 1996b). The affective domain (Eiss and Harbeck, 1969) includes values and value systems, which are an important basis for continual learning as well as being responsible for most people's overt behaviour; they also suggest that knowledge, feelings and emotions

are intertwined. Likewise, Iozzi (1989) summarizes various research findings on the relationships between affective domain and environmental attitudes, and suggests that at least in classroom-based environmental education, the affective factors are important components in teaching positive environmental attitudes and values to students. Moreover, Iozzi (1989) also argues that outdoor education is an effective way to improve environmental attitudes and values, as it provides schoolchildren with the opportunity to experience the natural environment directly. Hines *et al.* (1986) suggest personality factors, such as attitudes, locus of control (referring to an individual's perception of whether they have the ability to produce change through their own behaviour) and personal responsibility, as well as action skills, knowledge of action strategies and issues, situational factors and intention to act are influential in the promotion of behavioural changes. Furthermore, they propose the intention to act is the outcome of the combination of elements such as personality factors, knowledge and action skills. With positive attitudes, strong internal locus of control and a sense of personal responsibility, together with sound knowledge in issues and action strategies, the probability of promoting environmentally friendly behavioural intention is high. Other research in this area (see also Christensen and Dustin, 1989; Hungerford and Volk, 1990; Kals *et al.*, 1999) signifies a recurring theme that interpretation programmes need to appeal to people's emotions and feelings, i.e. the affective domain, and there may be possibilities of promoting responsible, patriotic and ethical behaviour. Additionally, emotions may trigger people's curiosity and possibly stronger willingness to explore further and to learn more (Kolb, 1984; Ballantyne *et al.*, 2007, 2011).

Cognitive psychology is the study of how people use information from their surrounding environment and memories to decide how to respond (Vander Zanden, 1980). Jean Piaget is considered one of the main contributors to cognitive psychology theories (Vander Zanden, 1980; Kolb, 1984; Falk and Dierking, 2000). He suggests that people have potential, or schema, to act or behave in a certain way. An individual's cognitive structure consists of a number of schemata at any given time. When an individual responds to incidents surrounding them in a manner consistent with their existing cognitive structure, the process is called assimilation. There are incidents or information with which an individual's existing schemata in their cognitive structure cannot correspond; the existing cognitive structure needs to be modified to enable the individual to develop new schemata in order for them to respond to new information or incidents. The process of modification of cognitive structures is termed accommodation. Changes in cognitive structure enable an individual to assimilate other aspects of their environment into their new cognitive structure. At the same time, people may alter their behaviour and adapt to the changing surroundings. Piaget also believes that we have a tendency to create harmonious relationships between ourselves and our surrounding environment. This concept is called equilibration and is the motivation to organize one's experiences constantly to ensure we adapt to or cope with our surroundings to achieve an equilibrium status (Hergenhahn, 1982; Kolb, 1984). Thus, when the information received fits the existing cognitive structure, the individual's cognitive structure is in equilibrium or a balanced state. On the other hand, accommodation occurs when the cognitive structure is not balanced. Learning occurs through the process of disequilibrium – accommodation – adaptation – reaching equilibrium – assimilation (Hergenhahn, 1982; Kolb, 1984).

Festinger's (1957) concept of dissonance and consonance echoes the searching for equilibrium. The assimilation and accommodation of information cognitive process is also manifested in the work by Moscardo and Pearce (1986) and Moscardo (1988, 1999) as to how and why to encourage visitors' mental state of mindfulness. Thus, when tourists have direct experience with tourism resources, the exposure to the plights these tourism resources face is likely to create a disequilibrium or dissonance that may prompt visitors to modify their behaviour and become more sensitive towards the environment.

Referring to the functions and principles of interpretation, it is evident that barring visitor access to tourism destinations does not facilitate learning. Tourism is experience (Pine and Gilmore, 2011) and unless visitors experience the destination first-hand it is unlikely they will have 'inclusive learning' about the very resources that attracted them to come in the first place. The concepts of emotional affinity, affective domain and cognitive learning are applicable to interpretation; in addition, learning stemming from interpretation that takes place in tourism destinations can trace its theoretical framework to experiential learning (Kolb, 1984). The cyclic nature of experiential learning is ideal to describe learning through interpretation in tourism destinations. Visitors experience the destination and from the visit are given the access to observe the destination and the tourism resources; through interpretation they are facilitated to reflect on how their behaviour and activities may impact, both positively and negatively, the tourism destination. Visitors may conceptualize even further and gradually adapt more sensitive and appropriate behaviour. Such cycles may continue with adaption of desirable behaviour applied to other tourism destinations.

### **13.5 Regulatory Information, Restrictions and Conditioning Learning**

In addition to cognitive learning, the application of social psychology (Ajzen and Fishbein, 1980; Ajzen, 1992; Fishbein and Manfredo, 1992) and conditioning learning (Vander Zanden, 1980; Hergenahn, 1982) is evident in many interpretation programmes as well as in general park management such as the application of regulations and restrictions. The main aim of this interpretation and the regulations and restrictions is to discourage undesirable behaviour through punitive messages and to reinforce or encourage the adoption of desirable or appropriate behaviour through rewards. The punishment or rewards in this context are wide-ranging. The punishment could be other people's negative opinions making an individual feel ashamed, a penalty or fine, or loss of opportunity to experience a close encounter with a particular tourism attraction (e.g. wildlife) due to inappropriate behaviour. The reward could be a sense of civic pride or fulfilment of personal responsibility (see also Hungerford and Volk, 1990) or the emotions of positivity or privilege resulting from direct experience with unique tourism resources, be it nature, culture or people. The application of conditioning coupled with the lobbying of visitors' emotions and affective domain in the wider VM strategy can be a powerful tool to stimulate the formation of desirable behaviour. In the case of wildlife tourism or tourism in ecologically or culturally sensitive areas it is particularly effective to use a combination of interpretation, regulations and restrictions and to appeal to visitors'

affective domain (see also Christensen and Dustin, 1989; Schänzel and McIntosh, 2000; Ballantyne *et al.*, 2007, 2011).

Most of the tourism destinations use regulatory information and restriction to manage and control visitor flow, on-site behaviour, visitor group size and timing of visit. In VM, regulatory information and restrictions work in tandem with interpretation: interpretation focuses on increasing visitors' knowledge and awareness (cognitive learning) as well as appealing to their affective domain to encourage the adoption of appropriate or desired behaviour, while the application of regulations and restrictions yields the immediate result of 'desirable visitor behaviour' wanted by the site management. Such application of regulatory information and restrictions draw on key elements in conditioning learning theories, namely reinforcement, punishment and shaping (Vander Zanden, 1980; Hergenhahn, 1982) of visitors' on-site behaviour. Unlike cognitive learning where the relationship between knowledge increase and behavioural changes may be difficult to observe during a short period of time, conditioning learning places strong emphasis on behaviour manifestation.

Conditioning learning is a type of learning whereby the consequences of behaviour alter the recurrence of that behaviour. If the consequences of a particular behaviour are deemed desirable by an individual, for example, a reward, that behaviour is likely to be reinforced and hence recur. Vice versa, if the consequence of a behaviour is unwanted, such as punishment, the future occurrence of that particular behaviour is likely to decrease. The principle of conditioning learning is manifested in many daily activities and is seen not only in human learning but also in animals. Parents teach young children table manners and when the children behave well they are rewarded, maybe through kind encouragement or positive praise, effective as long as the reward is desired by the children. When they behave badly they are punished, maybe a telling off or timeout in a corner. Training of dogs using reward (treats) and punishment is another example of the use of conditioning in strengthening or weakening the recurrence of a particular behaviour. In other words, the consequences, be they rewards or punishments, stimulate or dampen the recurrence of desirable or undesirable behaviour.

The use of regulatory information and restriction contains threats of punishment to deter unwanted on-site visit behaviour and it is not uncommon to see site management apply punishment when visitors engage in inappropriate or illegal activity or behaviour. Such punishment may be issuance of fines or loss of access to the site. The regulatory information and restrictions can be for visitor safety, or to protect the tourism destinations from unsuitable, inappropriate or overuse. However, such regulations or restrictions need to be legally enforceable in order for punishment to be applicable. Visitor codes are usually voluntary and therefore not law enforced and in the event of poor or inappropriate visitor on-site behaviour it is unlikely to deliver punishment. Nevertheless, the approval (or disapproval) by other members in a visitor's group or by other visitors may serve as a useful reward (or deterrent) to the occurrence of a behaviour. A visitor may fear shaming by their group members or other visitors and consequently an inappropriate behaviour, such as littering, may be inhibited. Furthermore, referring to visitors' emotional affinity and the attempt to appeal to their affective domain, the stimuli (the cause leading to the occurrence of a behaviour) applied to encourage or discourage the occurrence of certain behaviour can be tangible (e.g. being ordered to leave a site) or emotional (e.g. feeling positive

about oneself for being a 'good' visitor by stopping other visitors engaging in inappropriate activity), as long as the stimuli is considered relevant to the visitors.

## 13.6 Conclusion

Interpretation is now a common part of tourism experiences and there are visitors actively seeking information and interpretation (Stewart *et al.*, 1998). In tourism destinations that differ significantly from the visitors' home environment, interpretation is essential in facilitating and mediating the encounters between visitors and all elements at the destination, whether nature, people or culture. Interpretation has also been hailed as an integral component of wise utilization of tourism resources by enhancing understanding and promoting the formation of desirable behavioural intentions or behaviour itself. The purpose of this chapter is to emphasize the functions of interpretation framed by theories of social psychology, behavioural changes, education and learning. Interpretation design should be destination-specific, and it is imperative for site management to understand their core markets: who their visitors are, where they come from and their motivations of visits, in order to design an effective interpretation programme. In general, when the destination environment differs notably from the visitors' normal environment, visitors are likely to experience greater unfamiliarity with the destination's culture, people, nature and ecology during their visit. This is an opportunity for site management to offer interpretation with novel information that challenges visitors' existing cognitive structures, and to encourage visitors to adapt their cognitive structures, create new schemata and eventually foster the formation of desirable behaviour (cognitive learning). Interpretation that is planned and designed with the intention of promoting desirable behaviour can aid the management of protected areas by mediating the pressures upon resources brought by visitors; merely communicating factual information to visitors, however, is less likely to be effective in achieving this.

Interpretation, regulatory information and restrictions are commonly integrated into wider VM. They should work in tandem to ensure that visitors' on-site behaviour is appropriate and desirable, educational information about the tourism attractions are delivered effectively to the visitors, and the reasons are understood as to why certain behaviour or activities are regulated or banned while other behaviour or activities are welcome. Regulations and restrictions are important as VM tools as immediate results can be expected, nevertheless, visitors may not necessarily understand or agree with such regulations and restrictions. In this regard, interpretation can fill the gap by providing information and by educating visitors to appreciate the resources and to appreciate what behaviour is suitable to a particular tourism destination. More importantly, interpretative information that appeals to visitors' affective domain and emotional affinity is likely to encourage the formation of desired, appropriate behavioural intention and actual behaviour. Nevertheless, the causal relationship between increased knowledge through interpretation and the formation of appropriate behaviour is less than evident. In VM, it is not ideal to divorce the implementation of rules, regulations and restrictions from educational interpretation and it is imperative to blend them in a way to suit a particular tourism destination in order to manage visitors' on-site behaviour and activities while enhancing their knowledge and awareness of the site and how to behave.



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# 14 Critical Reflections on the Role of Interpretation in Visitor Management

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## 14.1 Introduction

Interpretation is often described as a key visitor management (VM) tool in leisure and recreation settings (Moscardo and Ballantyne, 2008). Definitions of interpretation typically focus on its management roles or functions, with general agreement that interpretation aims to create positive visitor experiences and to increase visitor knowledge about the places and/or people being interpreted (Moscardo, 2008). In the dominant information-processing or didactic approach to interpretation it is argued that this increased knowledge combined with a positive experience supports VM strategies by making visitors more open to accepting and following management advice about things like appropriate and minimal impact behaviours both at the site and beyond (Copeland, 2006; Ablett and Dyer, 2009). This approach is not, however, universally accepted, with the emergence of alternative perspectives on both the value and nature of interpretation as a VM tool. A consideration of these alternative approaches suggests some new ways to think about and use interpretation in VM.

This chapter begins with a review of definitions of interpretation, noting its relationships with other forms of communication between management and visitors. This is followed by a brief history of interpretation and VM that highlights the evolution of a range of management functions for interpretation. The evidence that interpretation is an effective VM tool is then critically reviewed, highlighting those factors that have been shown to be consistently related to positive outcomes. The chapter also examines recent critiques of interpretation and explores broader issues about the impacts that interpretation can have on destination communities, with the aim of identifying principles for the more effective use of interpretation in VM. It concludes by looking at future opportunities for interpretation and sustainable tourism.

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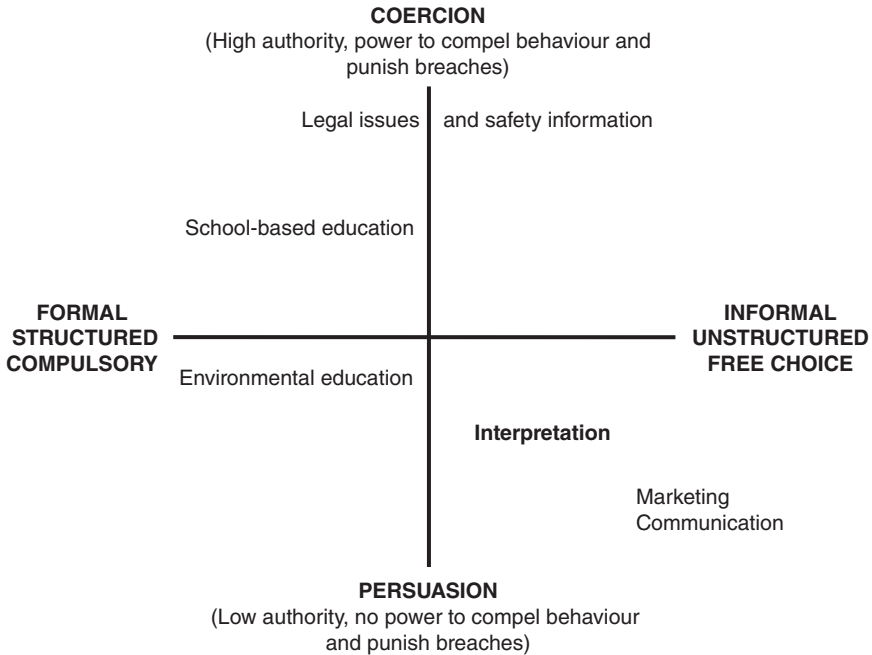
## 14.2 Defining and Describing Interpretation

Figure 14.1 presents a word cloud created from 40 formal definitions of interpretation taken from textbooks, the websites of major professional interpretation associations, and management documents from a range of protected area and heritage management agencies. The cloud highlights the most common and arguably the most important terms used to describe interpretation including: visitors, education, communication, understanding, information, heritage and experience. A simple count of the 20 most commonly included words in these definitions can be used to generate a working definition of interpretation that will be familiar to those who work in this field. That is, interpretation is a communication process that uses educational activities to present and explain information about the natural and cultural heritage of places or sites to help visitors understand and appreciate the significance of that heritage, so that they can have meaningful experiences and develop a sense of concern for that place or site.

It is common to find definitions of interpretation that include lists of the activities or media that are used by interpreters, such as exhibits, guided tours, presentations or lectures, signage, brochures, audio-visual displays (cf. ICOMOS, 2008, p. 4) and, more recently, websites and mobile applications (Staiff, 2014). It is also common in discussions of interpretation to distinguish it from other related concepts such as environmental education based on the level of formal structure, with interpretation seen as being more informal and unstructured (Moscardo, 2016). For example, Ballantyne and others (Ham, 1992; Ballantyne and Packer, 2011; Falk and Staus, 2013) use the terms ‘free-choice learning’ or ‘informal education’, highlighting the relatively voluntary nature of visitor participation in interpretation. This dimension of structure is presented in Fig. 14.2 along with a second dimension that has been used to describe interpretation, which is the degree of authority and/or power associated with a communication. This second dimension places interpretation as a type of persuasive communication where interpreters have some authority but typically only limited power over visitor behaviours. This figure distinguishes interpretation from the communication of information to visitors about safety, rules and enforcement, even though these areas are often linked in practice to interpretation.



**Fig. 14.1.** Key elements of definitions of interpretation. The size of the font relates to how frequently a word is mentioned in 40 formal definitions of interpretation, taken from textbooks, websites and management documents, with the largest fonts signifying the most frequently cited words.



**Fig. 14.2.** Interpretation in relation to other forms of communication.

### 14.3 Roles of Interpretation in Visitor Management

It could be argued that interpretation is a core element of tour guiding, and it has been a feature of tourism and VM since the ancient Greeks, Romans (Dewar, 2000) and Chinese (Yan and McKercher, 2013) travelled to appreciate landscapes and other cultures. The recognition of interpretation as a professional activity is much more recent, with the emergence of professional interpretation associations in the 1970s and 1980s and the development of formal training and academic research linked to a series of conferences held in the late 1980s (Staiff, 2014). Hems (2006, p. 2), however, notes there continues to be ‘a clear divide’ between the approaches and concerns of interpreters in the different heritage fields. She distinguishes between four main groups: large public sector heritage conservation and management institutions, smaller community groups, the commercial sector and academics. Within the first group it is possible to also distinguish between agencies responsible for protected heritage management, including natural heritage in places such as national parks and cultural areas such as archaeological sites, monuments and historic precincts and buildings, and collections-based institutions such as museums, art galleries, zoos, aquaria and botanic gardens. These different types of setting have different histories and circumstances, different VM challenges and, therefore, different roles for interpretation, as summarized in [Table 14.1](#).

The use of the term interpretation in connection to VM is usually linked to the work of John Muir and Enos Mills in the 19th century in the United States National Park Service (Dewar, 2000), with the publication in 1957 of the first edition of

**Table 14.1.** Different traditions of interpretation and visitor management.

	<b>Type of organization</b>			
	<b>Protected area management</b>	<b>Collections-based institutions</b>	<b>Community groups</b>	<b>Commercial tourism and leisure sector</b>
Major objectives	Conservation, access and appreciation	Conservation, appreciation and public education	Support for community well-being	Adequate return on investment
Key circumstances	Public sector, larger sites, difficult to control, susceptible to visitor impacts	Public sector, sites are easier to control, strong links to cultural/ social capital	Breakdown of community culture and networks	Highly competitive business environment
Critical changes	More visitors bring potential for significant negative impacts	Changes to social/ cultural capital in a post-modern world	Decline in traditional economic activities, globalization	Globalization, increased competition
Primary challenge in visitor management	Manage visitor impacts without widespread physical presence of interpretation	Connect to, and educate, an increasingly diverse public	Generate sufficient benefits from visitors consistent with community needs and aspirations	Provide positive, competitive visitor experiences

Freeman Tilden's book *Interpreting Our Heritage* seen as the beginning of the formal development of the field. This tradition of interpretation exists in the first column of [Table 14.1](#); in the time of Muir, Mills and Tilden the main focus of interpretation was on appreciation of the natural environment with little overt discussion of managing visitor impacts on the setting. With increasing visitation to natural protected areas in the latter decades of the 20th century and growing concerns about both the cumulative impacts of visitors and the potential intrusive nature of physical infrastructure to support visitor access and management (see Sax's 1980 book, *Mountains without Handrails*), the focus of interpretation shifted to managing visitor behaviour (Ablett and Dyer, 2009). Harvey's (2008) description of the history of cultural heritage and historic sites reveals a number of parallels in concerns about visitor access and impacts in these places.

A similar pathway can be traced for collections-based institutions, although the term interpretation is rarely used in these settings, being replaced by the terms visitor or public education (Hooper-Greenhill, 1999). These institutions share objectives linked to appreciation and conservation, with the key differences being a focus on

collections and a different history of public access. Unlike many natural protected areas and cultural heritage sites, which were often founded on the ideal of conservation of heritage as a public good and on the provision of access for that public, many collections began as either private activities and/or were developed for an elite, with public access and appreciation coming much later in their development (Abt, 2006; Alexander and Alexander, 2007). Issues of power, elitism and cultural capital continue to create challenges for these institutions when they seek to expand their reach to a wider set of audiences and to give visitors and their education a more central role (Fyfe, 2006; Bennett, 2013). Changes in social hierarchies and the nature of social and cultural capital in postmodern societies have meant that in these settings there is increasing pressure to provide social and cultural access for a diverse range of visitors rather than just physical access to the collections (Prior, 2006; Bennett, 2013).

These first two types of interpretive settings also share a common link to the public sector, with many of them being government or quasi-government agencies or reliant on significant public funding to operate. With increasing pressure to justify public spending, many of these organizations have had to find ways to both increase visitor numbers, as a signal of their value, and to generate financial support from visitors, either directly through admission or user fees, or indirectly through merchandising, sponsorships and fundraising (Runte, 1997; Alexander and Alexander, 2007; Newsome *et al.*, 2012). This means a shift towards thinking about the nature of the experience being offered to visitors and a need to think about competing with other commercially available visitor experiences (Dearden *et al.*, 2005; Alexander and Alexander, 2007).

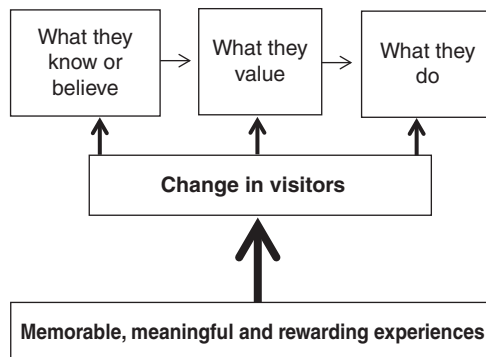
The third and fourth types of interpretive settings are much less easily defined and delineated and cover a much more diverse range of settings and activities, but they can be linked to community development, heritage and public education through the related concept of socio-cultural animation (Simpson, 1989), and to commercial activities in tourism through the concept of touristic animation (Krippendorf, 1987). Socio-cultural animation is a term widely used in continental Europe to describe a social movement made up of multiple activities which encourages people 'to undertake a wider range of experiences through which they find a higher degree of self-realization, self-expression, and awareness of belonging to a community they can influence' (Simpson, 1989, p. 54). Activities include community arts programmes, cultural performances, festivals, community activities around local cultural heritage, and programmes of informal and adult education (Simpson, 1989; Foth, 2006). Adams and Goldbard (2002) highlight the importance of these activities for maintaining local culture and heritage in the face of urbanization and globalization and for supporting ongoing community development. Not surprisingly, tourism is often seen as a potential way to fund and support these community heritage animation projects and this has been cited as an important function for interpretation at the destination level (Bramwell and Lane, 2005). Bangstad's (2011) description of using tourism to support the development and maintenance of industrial heritage routes in Europe, Al-Hagla's (2010) discussion of tourism supporting urban redevelopment of historical areas in Lebanon, Ventura and de Castro's (2011) analysis of animation in historic villages in Portugal, and Quinn's (2006) exploration of tourism and festivals in Ireland are all examples of this intersection between socio-cultural animation and tourism.



This idea of animation as a process of bringing local heritage to life and offering opportunities for the participants to learn and develop is central to Krippendorf's (1987) application of animation to tourism. Krippendorf defines this touristic animation as 'providing information, ideas and stimuli [...] [that] should help remove barriers, it should encourage the exploratory spirit and openness for new contacts [...] Animation is help towards self-help, stimulation of self-creativity and self-participation' (1987, p. 142). Thus touristic animation includes the interpretation elements of guided tours (Cohen, 1985), educational activities and excursions to museums and sites of cultural and natural significance as part of tour packages and cruises (Pompl, 1983), and experiences in themed attractions (Ivkov and Stamenkovic, 2008). Animation is seen as a critical competitive element for positive experiences offered by many commercial tourism and leisure businesses (Stamboulis and Skayannis, 2003).

Despite very different backgrounds and terminologies and major VM challenges, all four of the traditions described in Table 14.1 share common ground in that they use interpretation in two main roles – to support visitor experiences and to change visitors in some way. Figure 14.3 describes the connections between these two main roles for interpretation, as well as the range of changes in visitors that are linked to interpretation. All four traditions share the need to attract visitors and provide them with meaningful and rewarding experiences that they are willing to promote to others, to repeat and/or to pay for. For the protected area management agencies and collections-based institutions this is commonly part of their charter and one of the reasons for their existence, and is increasingly necessary for generating funding to support their operation. Community groups have similar needs but also want positive visitor experiences to support opportunities for development and enhanced esteem for their constituents. Commercial businesses need positive visitor experiences to stay in business.

While assisting visitors to have rewarding memorable and meaningful experiences is the primary function of interpretation in Fig. 14.3, it is also seen by many as a necessary pre-condition for the second function of interpretation, that of changing visitors. Changing visitors can be broken down into three main connected areas – changing what visitors know or believe, what they value or care about, and what they do. Changing what visitors know or believe can be further divided



**Fig. 14.3.** Key visitor management roles for interpretation.

into visitor or public education as an end in itself and visitor learning as a prerequisite for changing visitor behaviour. For many organizations, especially within the collections-based institutions and community groups, visitor or public education is a key objective. A review of the mission statements of 134 zoos and aquaria in the USA, for example, found that 131 included some aspect of education in their overall mission (Patrick *et al.*, 2007). This review found that the second most common element of these mission statements was conservation, with many linking education to conservation.

The second type of change, where learning is seen not so much as an end in itself but as a prerequisite for changing visitor attitudes and values, leads to a change in behaviours both on-site and beyond (Fig. 14.3). Changing what visitors care about is rarely encountered as a goal that exists on its own; rather these changes are seen as a necessary step between learning and action. This view of interpretation as persuasive communication to support a change in visitor behaviour is especially common in the area of protected natural area management. Typically, the target on-site actions are connected to minimal impact behaviours, such as not littering, not feeding or harassing wildlife, staying on marked trails, and not using local vegetation for campfires. Where sites are large, visitor pressures are high and/or there is limited opportunity for direct vigilance and control of visitor behaviour, then interpretation is seen as a way of informing and encouraging visitors to comply with rules and guidelines designed to protect them and the heritage they are visiting. This can also apply to commercial businesses that operate in and around natural and cultural heritage sites. With growing concerns about sustainability more generally there is increasing interest in the potential for tourism to contribute to changes in behaviours beyond the places that are visited (cf. Ballantyne *et al.*, 2011; Walker and Moscardo, 2014).

There are also more direct ways in which interpretation can influence what visitors do. It is possible to use interpretation to create a rewarding visitor experience that acts as a substitute for visiting actual sites. This use of interpretation can protect fragile sites and/or reach a wider range of visitors. It is also possible to use interpretation services to limit, manage and alter visitor flow around a site. An example of this can be found at Seal Bay on Australia's Kangaroo Island, which is home to a permanent sea lion colony. In order to minimize tourism impacts a visitor interpretive centre was built above the colony's beach, offering an experience for visitors not willing or able to access the beach. In addition, visitors may only access the beach as part of a guided interpretive tour (Newsome and Rodger, 2008).

## 14.4 Interpretation Effectiveness

Regardless of the setting, the core role for interpretation in VM is to support memorable, meaningful and rewarding experiences, and evidence about the effectiveness of interpretation in this role can be found in research into customer and tourist experiences, visitor studies and interpretation evaluation. Overall, the available evidence suggests that interpretation can, and often does, make significant positive contributions to visitor satisfaction and general positive evaluations of their experiences in a range of tourist and leisure settings (Ballantyne *et al.*, 2009; Moscardo, 2014). There

is also considerable evidence supporting a set of factors that consistently contribute to these positive outcomes, including:

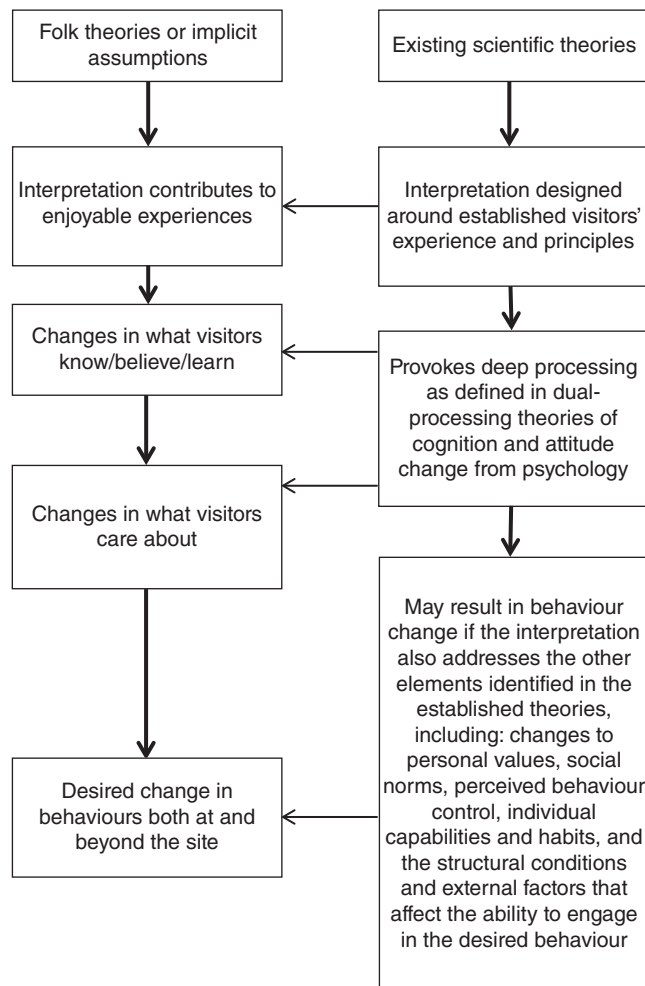
- the inclusion of unique, rare, novel or surprising elements to capture visitor attention;
- designing variety into the interpretation in terms of different media, changing presentation styles, including a range of different activities, and engaging multiple senses;
- providing opportunities for visitors to participate in the interpretation beyond being a passive audience or listener and allowing them to interact with both the material being interpreted and with each other;
- giving visitors some control over aspects of the interpretation through choices and decisions that allow them to build connections with their personal context;
- the use of consistent themes, especially archetypal ones such as danger and survival under threat, maintenance of family and social groups, survival information about places and animals, altruism and responses to injustice;
- using stories to structure the interpretation content and sequences of activities; and
- opportunities for learning (Hollenbeck *et al.*, 2008; Jacobsen, 2008; Moscardo, 2009; Moscardo, 2010; Ham, 2013).

Visitor experience research also supports the effectiveness of interpretation in providing substitute experiences for accessing the actual site or to limit or control visitor flows. This does not mean, however, that this management strategy is warmly received by all visitors or that it is always effective in minimizing negative impacts on the setting. There can be issues with regular visitors feeling excluded and restricted by such options and there are also suggestions that effective interpretation experiences can encourage higher levels of visitation, which in turn contributes to negative outcomes (cf. Higham, 1998).

The last factor in the list of elements that contribute to memorable and rewarding visitor experiences is learning, which is also the second main function for interpretation in VM. The majority of research in the areas of visitor studies and interpretation evaluation include some measure of learning and generally visitors do report changes in what they know about interpreted topics (Moscardo, 2014). What is not clear is the extent of this learning, whether it is always consistent with the educational objectives of the interpreters, and how long it is remembered beyond the interpretation experience. Learning from interpretation is highly dependent on what visitors already know or believe when they come into an interpretive setting (Ballantyne *et al.*, 2011) which means it is very difficult to both plan for and to gauge the extent of specific educational outcomes of an interpretive programme. The available evidence suggests that the factors listed for the positive experience evaluations are also those that encourage visitor learning with additional attention paid to linking content to what visitors already know, the use of clear structures to organize information, avoiding the presentation of too much information, and consideration of the types of language used in both verbal and written presentations (Moscardo *et al.*, 2007).

While there is evidence that upholds the interpretation features needed for memorable visitor experiences that support learning; there is much less evidence and agreement about the effectiveness of interpretation in its other VM roles (Moscardo, 2014). Ablett and Dyer (2009) note the dominance of what they call cognitive information processing theories of interpretation, especially in protected

heritage settings. Figure 14.4 provides an overview of this approach and distinguishes between two types of theory – one that can be described as an everyday or folk theory that is assumed in many interpretation design and evaluation papers, and one more explicit and based on scientific theories from persuasive communication and cognitive psychology. A large proportion of the interpretation literature is driven by the implicit assumptions of the folk theory about visitors with very few that adopt the explicit theories that are available (Kim *et al.*, 2010; Jensen *et al.*, 2011). The major problem with this is that interpretation designers and evaluators often ignore key variables, such as personal values, social and cultural norms, everyday habits, constraints and capabilities, and structural features of settings beyond the control of the visitor, that have been shown in a range of other situations to be critical in changing what people care about and do.



**Fig. 14.4.** Theories of interpretation and changes to visitor attitudes and actions. (Adapted from Moscardo, 2014.)

This argument would therefore suggest that it is unlikely that current interpretation practices alone will have consistent significant impacts on visitor attitudes or behaviours, particularly those beyond the setting. In addition, there have been a number of critiques of the research that evaluated interpretation effectiveness, noting problems with poor methodologies, a focus on a limited range of variables, inappropriate measurement of variables, and a focus on immediate changes, with few studies examining any changes that persist over time (Littlefair and Buckley, 2008; Munro *et al.*, 2008; Weiler and Smith, 2009; Kim *et al.*, 2010; Jensen *et al.*, 2011; Hughes, 2013; Moscardo, 2014). To date, the most accurate conclusion in this area is that while it is possible that interpretation might influence what visitors care about and do, there is currently little consistent evidence to suggest that it actually does make a difference in these areas (Moscardo, 2015). If we accept that changing visitor behaviour is a suitable goal for interpretation then it is clear that much greater and more detailed attention needs to be paid to contemporary theories of attitude and behaviour change (cf. Bohner and Dickel, 2011; Petty and Brinol, 2011; Vogel *et al.*, 2014) and interpretation needs to be more carefully integrated with other VM strategies.

## 14.5 Critical Reflections on Interpretation

Not all commentators agree that changing visitor behaviour is a suitable goal for interpretation, with a number of critiques of this and other aspects of current interpretive practice. Bramwell and Lane (2005), in a summary of the potential and pitfalls of interpretation and sustainable tourism, proposed four main dangers associated with interpretation – over-interpretation, intrusion, commodification and elitism. These concerns have been repeated and extended in other discussions, but at core they reflect an ongoing tension in interpretation between interpreters – who have the power and control over what is interpreted, how it is interpreted, the extent and intensity of the interpretation, and the role given to visitors within this interpretation – destination communities and other heritage stakeholders, and visitors.

In the past, museums, art galleries and agencies linked to cultural heritage and historic sites have been criticized for how they make decisions over what to interpret or present to visitors, which are often political and reflect stories chosen by those with power (Waterton and Smith, 2010; Bell, 2103). Decisions about whose story to tell in an interpretive setting can have serious implications for the ways in which people associated with the setting see themselves, empowering some groups and disempowering others (Best and Phulgence, 2013; Wong, 2013). Such issues have also been raised within tourism in general (Goulding and Domic, 2009; Watson, 2015), but these concerns have generally been given little consideration in the realm of environmental heritage. Staiff *et al.* (2002) describe the dominance of western scientific perspectives in natural area interpretation and note that while this is rarely questioned it is not the only option, with considerable room for indigenous perspectives to be included in visitor interpretation. Most research into interpretation effectiveness and most guidelines for the design of interpretation assume that the content and perspective chosen for the interpretation is appropriate and uncontested (Moscardo, 2014).

Concerns over whose story is told in interpretation are generally considered as a tension between relevant heritage stakeholders or destination community groups and

those responsible for the interpretation. The other major power contest in interpretation is between the interpreters and the visitors. According to the social commentator Fintan O'Toole, interpretation deliberately seeks to disempower individual visitors, it is intrusive and designed to prevent visitors from engaging with the setting and creating their own meanings. O'Toole (1992, p. 12) describes interpretation as 'the revenge of the intellect upon the world. To interpret is to impoverish, to deplete the world'. He concludes that all that visitors can gain from the interpretation provided in many tourism settings is to be 'entertained, mildly educated, fed, relieved and gently parted from some money' (2007, p. 16). Ablett and Dyer (2009) and Copeland (2006) present more academic versions of this argument for tourism and museums, respectively. Copeland (2006) argues that much museum education has taken a positivist didactic approach where the educators or interpreters decide exactly what knowledge should be imparted and visitors are relegated to the role of passive receivers of this wisdom. In these models of interpretive practice much attention is paid to the development of clear, easily measurable objectives on exactly what visitors are expected to learn from their time in the setting. He argues instead for a more constructivist approach where the role of interpretation is to challenge visitors to create their own meanings. Ablett and Dyer (2009) make a similar argument suggesting that the rise of the information processing approach from cognitive psychology has encouraged interpreters to focus on trying to control not only what visitors actually do, but what they think and care about. Like Copeland, Ablett and Dyer (2009) believe that the core goal of interpretation is to support visitors in being mindful about their experiences and to develop their own meanings, and they argue for a return to Tilden's original interpretive principles.

## 14.6 Principles for Effective Interpretation Practice

These critical reflections on the current approaches to interpretation suggest a convergence between Tilden's 1957 description of interpretation, the concept of mindfulness and a more explicit consideration of the balance of power in deciding what is presented, how and to whom. Tilden's (1977) original six principles for interpretation are listed in [Table 14.2](#); they provide both a definition of interpretation and its purpose, which is revelation and provocation based on the provision of information, as well as ideas to guide interpretation design, notably to relate the interpretation topic to the personal context of the visitor and to take a holistic approach to topics. These latter two principles are consistent with the factors that have been shown to be important for memorable and positive visitor experiences.

In addition, the idea of revelation and provocation are consistent with the concept of mindfulness from cognitive social psychology. Moscardo connected mindfulness theory to heritage interpretation and tourism in 1996 and has subsequently further extended this application of mindfulness theory to tourism (1999, 2009, 2010). Mindfulness theory seeks to explain how people respond to information in everyday social settings and is a type of dual processing theory developed by Ellen Langer (Langer, 2014). Dual processing theories predict that in any situation individuals can engage in one of two types of cognitive processing: shallow (mindless) or deep (mindful) (Moscardo, 2009). [Table 14.3](#) provides a definition of these two states, the outcomes linked to each and the interpretation factors that have been

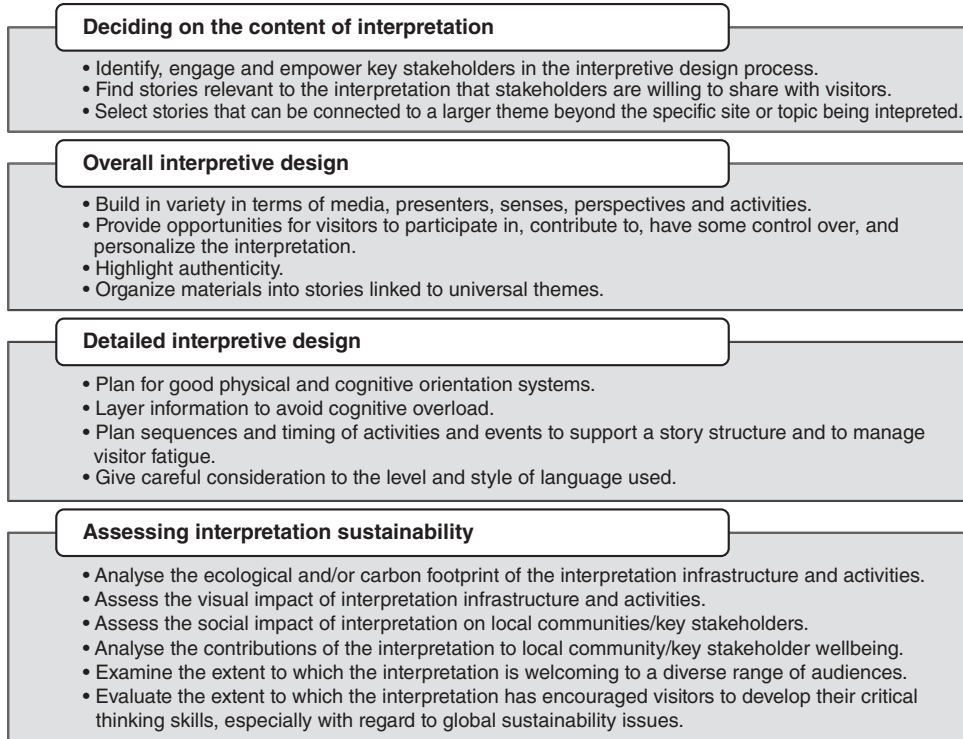
**Table 14.2.** Tilden's six principles for interpretation. (From Tilden, 1977, p. 9.)

1. 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.
2. Information, as such, is not interpretation. Interpretation is revelation based upon information. But they are entirely different things. However, all interpretation includes information.
3. Interpretation is an art, which combines many arts, whether the materials presented are scientific, historical or architectural. Any art is in some degree teachable.
4. The chief aim of interpretation is not instruction, but provocation.
5. Interpretation should aim to present a whole rather than a part, and must address itself to the whole man rather than any phase.
6. Interpretation addressed to children (say up to the age of 12) should not be a dilution of the presentation to adults, but should follow a fundamentally different approach. To be at its best it will require a separate programme.

**Table 14.3.** Mindlessness versus mindfulness. (From Moscardo, 2009, 2010.)

<b>Cognitive state</b>	<b>Mindlessness</b>	<b>Mindfulness</b>
Definition	'A state of rigidity in which one adheres to a single perspective and acts automatically' (Carson and Langer, 2006, p. 30).	'A flexible cognitive state that results from drawing novel distinctions about the situation and environment. When one is mindful, one is actively engaged in the present and sensitive to both context and perspective' (Carson and Langer, 2006, pp. 29–30).
Outcomes	<ul style="list-style-type: none"> <li>- Limited learning</li> <li>- Poor decisions</li> <li>- Learned helplessness</li> <li>- No changes to existing attitudes</li> <li>- Negative emotional states including boredom and frustration</li> </ul>	<ul style="list-style-type: none"> <li>- Enhanced capacity to learn</li> <li>- Better decisions</li> <li>- Feelings of control and achievement</li> <li>- Greater ability to change</li> <li>- Enhanced creativity</li> <li>- Improved health</li> <li>- Positive emotional states including satisfaction</li> </ul>
Contributing factors	<ul style="list-style-type: none"> <li>- Familiar or repetitive situations where it easy to learn or recall a routine script for behaviour</li> <li>- Situations with little personal significance or relevance</li> <li>- Situations where the individual is passive with little choice or control</li> <li>- Fatigue, information overload</li> </ul>	<ul style="list-style-type: none"> <li>- Variety and change</li> <li>- Situations with high levels of personal significance or relevance</li> <li>- Opportunities to interact, engage and take control</li> <li>- Taking a different perspective or accessing multiple perspectives on a topic/situation</li> <li>- Authenticity</li> <li>- Use of stories and themes</li> </ul>





**Fig. 14.5.** Interpretive design principles.

found to encourage these states in visitors. Again there is considerable overlap with the factors linked to positive visitor experiences.

Combining the results of research into positive visitor experiences and mindfulness in tourism settings, Tilden's interpretation principles, and the issues raised about who decides on the content of interpretation, with a broader consideration of sustainability, it is possible to suggest a set of principles for sustainable heritage interpretation for visitors. These are organized into four groups as presented in [Fig. 14.5](#). The first group is where the content and focus of the interpretation is considered and addresses the issues of community and stakeholder engagement and empowerment, the avoidance of commodification and the identification of a set of appropriate stories that can be used to guide the interpretive design. The second group includes broad interpretive design principles, while the third group identifies areas for more detailed attention. The final group focuses attention on assessing the sustainability of the interpretation infrastructure and activities. This latter set of design principles reminds us that interpretation itself must be sustainable.

## 14.7 Interpretation and the Future

The last group of principles in [Fig. 14.5](#) is about the sustainability of interpretation itself, rather than the role that interpretation can play in encouraging more sustainable

tourism, which is the more common relationship discussed in the literature. This reflects one of three key themes that are likely to have significant impacts on interpretation in the near future – changes in the awareness and nature of sustainability, the shift to Web 2.0 and beyond, and the experiential turn in tourism and consumption in general.

It is clear that there has been a significant increase in public and political awareness of and concern about sustainability. Furthermore, discussions about sustainability have moved beyond environmental issues to include more attention to social sustainability issues such as ethics, justice and political empowerment (Springett, 2010). These two trends, within broader discussions of sustainability, have two implications for tourism and related activities. The first is an increasing pressure on businesses and organizations in these settings to demonstrate not only sound environmental management, but also that they have paid attention to issues of ethics and social justice and can show that they are making overall positive contributions to the well-being of all key stakeholders. It also means that there has been increasing pressure on tourism as a sector to demonstrate how it actively contributes to improving sustainability beyond tourism (Moscardo, 2015). This means that site- and place-specific interpretation will need to make more effort to link their stories to a larger context and to use sites as examples to demonstrate broader principles.

A recent book by Staiff (2014) provides numerous examples of visitors creating their own meaningful experiences in various tourist settings using combinations of their own history and interests, information and/or questions from heritage interpretation and knowledge and alternative perspectives provided from a range of sources through their use of mobile technologies and social media. In these examples visitors are using these technologies, often collectively referred to as Web 2.0 (Mika and Greaves, 2008), to challenge the authority and power of interpreters. Interpreters have generally been reluctant to adopt these new technologies and where it has happened it is usually a case of using these new options as more efficient tools to achieve the same goals. Picken (2014) refers to this as analogue thinking, which is in contrast to digital thinking that explores how these new technologies may change the objectives and the nature of the activity as a whole. Bohlin and Brandt (2014), for example, review the use of digital guides on mobile phones as an interpretation tool. They suggest that this technology provides the opportunity to present multiple perspectives and a wide range of stories about a setting for tourists to select from, thus contributing to the personal connections that are said to be important for effective interpretation. Their review concludes, however, that this is rarely done, with most digital guides reproducing the interpretation that is already provided in traditional text and personally guided tours (Bohlin and Brandt, 2014). As interpreters begin to move towards changing practices and encouraging and guiding visitors to use the additional resources available through Web 2.0, this world of digital technology is also changing and moving towards what has been called Web 3.0 or the ‘internet of things’ (Whitmore *et al.*, 2014). New technologies may be able to address some of the control of visitors’ behaviours needed to minimize negative impacts, relieving pressure on interpreters to focus so intently on on-site behaviours and allowing them to consider how they can use the opportunity to build memorable visitor experiences that connect to their lives beyond the setting.

The idea of an experiential turn has been noted in a diverse range of areas from education (Boud, 2012), marketing and consumption in general (Dormer and

Sundbo, 2008), and particularly in tourism (Tung and Ritchie, 2011). In tourism this is seen in the rise of tourists explicitly seeking clearly labelled, immersive and themed experiences that go beyond just escape and relaxation, and are often educational (Berridge, 2012; Moscardo, 2015). This is essentially an expansion of touristic animation and one consequence of this experiential turn has been the extension of interpretation into a wider range of tourist settings such as restaurants, breweries and shopping villages. This provides opportunities to extend the use of tourism as a place-based educational strategy for sustainability, to include more local participation in tourism and to provide a wider range of stories to encourage mindful visitors. It does, however, also raise some challenges. Potential issues include visitor fatigue, especially with repeated messages contributing to eco-fatigue (Kelsey, 2012), and hyper-reality, where an off-site experience (e.g. an aquarium) is so intense, particularly with the use of technology, that any subsequent on-site experience (e.g. visiting a marine environment) seems limited and less rewarding (Macleod, 2006). These final two issues reiterate O'Toole's (1992, 2007) concerns about the dangers of excessive use of interpretation in tourist and recreation settings. While there is a clear need to manage visitors, it is important that interpretation remains a form of persuasion rather than propaganda.

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## **Part V Conclusion**

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# 15

## Current Knowledge and Future Research Directions in Visitor Management

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### 15.1 Introduction

It is the aim of this book to further our understanding of visitor management (VM) using current empirical research and case studies. Chapters contributed by international tourism scholars discuss theoretical and practical approaches towards contemporary VM in tourism destinations. This final chapter reviews the key findings from this book in order to derive a conclusion as well as future research directions. Three elements are found to be crucial to the conceptualization of VM. First, exercising influence over movement and behaviour of visitors contributes to the protection or enhancement of the destination and its natural, social, and/or cultural values. It can potentially improve visitor safety as well as economic viability. A second focus concerns the visitors' learning and appreciation of the attraction or destination. These ideas are linked conceptually to the visitor experience. Lastly, VM interventions can create economic benefits, for instance by dispersing visitors and directing them to the part of the destination most suited to their needs, or by encouraging visitation at times of spare capacity.

This book covers a wide but by no means exhaustive range of VM interventions or, conversely, situations where VM is required or might improve a situation. All chapters share the assumption that, if applied well, VM interventions are beneficial to the visitor experience, tourism product, tourism business or destination in question. It is acknowledged that VM interventions may impact negatively upon visitor experiences where they are incorrectly targeted or applied, do not match the (intended) visitor experience, or are intrusive.

Chapters in this book cover a range of scales from the attraction/site level (Chapters 3, 5, 6, 9, 10, 11, 12), the destination level (Chapters 7, 8) to overall conceptual issues (Chapters 2, 4, 13, 14). Challenges at the attraction/site level tend to

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relate to site-specific issues like crowd control and influencing visitor movement and behaviour. Many chapters identify the involvement of stakeholders beyond the business or site as a crucial factor in addressing VM challenges. Destination-related issues, in contrast, are visitor managed with regard to access, management of varying visitor segments and visitor dispersal. Conceptual themes covered here include the situation of VM in its wider context as well as its conceptual framing, culture as a determining factor in VM decision-making and implementation, and themes related to interpretation, namely the application of learning theory and identification of aspects of interpretation that are most relevant for VM.

## 15.2 Visitor Management in Context

As indicated in Chapter 1, VM is often perceived to fall under the umbrella term of destination management. Chapter 2 takes a differentiated perspective on this conceptual issue by closely examining the relevant literatures as well as cruise tourism as a (both visitor and destination) management issue. It is found that, as would be expected, the two planning activities are not exclusive but instead offer scope for mutual benefits where VM's emphasis on site-specific issues is enriched by consideration of inter-site and destination-wide matters. Framed thus, VM can indeed be seen as one function within destination management. The author suggests that, in turn, destination management must include VM, thus considerably extending the accepted responsibilities of many destination managers. Where many authors' conclusions here might have highlighted the need for stakeholder collaboration in planning and management, it is important, interesting and encouraging to note that Pearce sees co-creation of overall visitor experiences as well as research as the main emerging themes.

Chapter 3 follows up on the theme of co-creation of visitor experiences by investigating related frameworks and collaborative models that posit visitor experiences and attractions as parts of the tourism system, thus emphasizing the variety of stakeholders involved. Importantly, this chapter points to the significant roles that the tourists themselves have in co-creating their experiences by, for example, transcending the destination setting and making use of advances in technology and social media during the pre, during and post stages of travel.

The last chapter in Part I focuses on external factors impacting on VM at the individual business level, namely the social and political conditions of the host country. One of the few Iran-based tourism studies published in a Western context, Chapter 4 suggests that the country's social and cultural conditions influence not only the selection of accommodation styles but also the VM implemented therein. Dealing with 'misbehaving' guests (also a concern raised in Chapter 9) is identified as particularly challenging in contexts where cultural incompatibility of guests and hosts may occur. The author considers possible VM interventions suitable to this combination of external and internal factors with regard to visitors' mindfulness, and while 'soft' VM interventions are seen as more desirable, 'hard' VM interventions are sometimes necessary.

Overall, this set of introductory chapters raises three important issues that are to date underrepresented in the relevant literature: first, the relationship between destination management and visitor management is addressed both conceptually and practically; second, models and frameworks related to visitor experience management

are explored. It is important to note that both Chapters 2 and 3 suggest that visitor experiences are co-created (with the visitors) rather than merely provided by destination stakeholders. Third, the last chapter in this section is one of the few works that draws attention to external conditions and environmental factors that impact VM and, as a result, visitor experiences.

### 15.3 Critical Concepts in Visitor Management

The critical concepts in VM explored here include indicators and standards-based VM frameworks, VM and service quality and visitor affinity. While there are other critical concepts that are relevant to the theme of the book (such as limits of acceptable change or carrying capacity more generally), the ones chosen here reflect the most recent relevant research.

Applying normative theory, Chapter 5 explores the use of indicators and standards-based VM frameworks to manage crowding at heritage sites. Though normative theory is widely used in outdoor recreation studies to identify indicators and standards, Chapter 5 is one of the few studies to apply social norms as well. Indeed, by including the visitor perspectives as a basis of indicator and standard development, this chapter echoes the theme of co-creation of visitor experiences that was identified in Part I (Chapters 2 and 3).

Chapter 6 relates the central concept of service quality to visitor satisfaction and future visitation intention. While the positive relationship between high quality service and visitor satisfaction in general is unsurprising (e.g. Chan *et al.*, 2015), its equal applicability to nature-based tourism is less self-evident. The authors therefore call for development of a greater understanding of what constitutes service quality in a nature-based tourism context in order to better manage visitor satisfaction through appropriate (policy) decisions.

The critical concept applied in Chapter 7, visitor affinity (see Packer *et al.*, 2014 on environmental attitudes), results in recommendation of a stronger focus on product development in tourism in protected areas. Benefits of innovative products in relation to interventions such as education, pricing strategies and business partnerships are evident with regard to visitor dispersal, local participation and economic benefits. Importantly, using the concept of visitor affinity allowed for the development of recommendations targeted to different kinds of visitors. The authors suggest that the relevant factors thus identified can feed into an ongoing monitoring programme (see Chapters 5 and 8).

### 15.4 Current Issues in Visitor Management

The transferability of a visitor monitoring approach between two very different settings is the topic of Chapter 8. A United States Forest Service methodology for visitor monitoring is implemented in a region in the Brazilian rainforest so as to improve visitor (impact) management. As the development of VM interventions is usually site-specific (see also Chapter 2), the practical acknowledgement that other areas also deal with issues such as recreation conflict or resource issues may make

best practice methods more widely accessible, thus potentially relieving funding or staffing issues of less well-off destination marketing/management organizations, or protected area managers.

The consideration of tourist behaviours, vandalism and possible responses in Chapter 9 gives rise to a two-pronged approach to VM that goes beyond the widely used 'soft' and 'hard' approaches to visitor impact management (such as attempting to modify visitor behaviour through information and education, or surface and target hardening). Here, both legal and economic levers are considered as possible means by which to control tourism-induced vandalism. It is suggested that fining tourists who engage in behaviours like littering, spitting etc. can provide a powerful incentive for tourists to adapt to local rules. As the expense of enforcing these penalties is a major limiting factor in implementing these measures, the use of closed-circuit television cameras is considered to monitor public spaces and public behaviour.

Technology is the focus of Chapter 10. Considering existing uses of augmented reality applications, important factors for its implementation in emerging tourism destinations are identified. These include the lack of experts available locally to install and maintain such technology, the need for specific spaces to use the technology, and visitors' lack of knowledge and, potentially, as a result, interest in such technology.

Interestingly, the theme of technology features in all three 'current issues' chapters; as a data gathering tool in Chapter 8, as a possible means by which to achieve desirable public behaviour in Chapter 9, and as an addition to the visitor experience in Chapter 10. Technology as an important factor of future VM will be revisited in the conclusion of this chapter.

## 15.5 The State of the Art in Guiding and Interpretation

Personal techniques of engaging the visitor (Weiler and Walker, 2014) are arguably among the themes in VM that have been discussed in the greatest detail. This book is thus no exception in providing space for the further discussion of these topics. Chapter 11 identifies an extensive array of factors that inform the operationalization of museum guided tours. These cover guide-specific factors, such as educational background, museum-specific factors and tour-specific factors like group size. Accessibility, opening hours that suit a wide range of possible visitor groups and pricing in particular, are also identified as important sets of factors. Lastly, multisensory experiences that are associated with positive emotions (Jonasson and Scherle, 2012) are identified as important contributors to the visitor experience (see also Chapter 10).

Chapter 12 considers the capacity for heritage interpretation to address VM challenges on film-tourism sites. The authors suggest that heritage interpretation can be a valuable VM tool where proactive management strategies are needed to maintain high-quality visitor experiences at increasingly crowded sites. In addition, it can help adjust visitors' perceptions of the site by mediating unrealistic expectations that may have been raised in visual media like film. At the same time, heritage interpretation adds value for visitors whose primary motivation for visiting the heritage site does not lie in film tourism.

Theories of learning and their applications in interpretation are the topic of Chapter 13. Though interpretation is sometimes hailed as a cure-all for VM and visitor

impact issues, its cognitive underpinnings are surprisingly little understood. Kuo addresses this knowledge gap by identifying and highlighting the functions of interpretation framed by theories of social psychology, behavioural changes, education and learning. Where a destination differs strongly from the visitors' usual environment, they likely experience unfamiliarity. This is described as an opportunity to offer interpretation that challenges visitors' cognitive structures and encourages them to adapt, thus engaging in cognitive learning.

The last chapter in this section reflects on the roles of interpretation in VM. Sustainability is used as one example (among several) of how an important current issue can be emphasized using interpretation. Site- and place-specific interpretation is found to require more effort to link their stories to a larger context and to use sites as examples to demonstrate broader principles such as sustainability. Interestingly, the two themes of co-creating of experiences and technology that come up in a number of contexts in this book emerge again, albeit in a somewhat problematic context. Interpreters' reluctance to engage in Web 2.0 technologies is juxtaposed to visitors' extensive use of them, sometimes to challenge the knowledge and authority of the interpreters. Related to this, the experiential turn in tourism (but also marketing etc.) is described as leading to the extension of interpretation into a wider range of tourist settings, thus providing opportunities to extend the use of tourism as a space to learn about sustainability and/or encourage mindfulness. Downsides of the experiential turn identified here relate to visitor fatigue and hyper-reality (MacLeod, 2006) where an off-site experience might outshine any subsequent on-site experience. Again, the theme of innovative technology emerges as an increasingly significant consideration in current and future visitor experiences and VM.

## 15.6 Conclusions

This book demonstrates the wide range of current research into VM, and it provides insights into theoretical as well as practical issues. Covering conceptual foundations, critical concepts, current issues, and guiding and interpretation, it addresses numerous gaps in our understanding of VM in tourism destinations. That said, despite its wide range of topics and themes, no book can completely cover contemporary VM. If anything, the empirical studies presented here shed light on an even wider range of possible research topics that without a doubt would enhance our knowledge of VM further.

Event logistics, for example, have not been included in this book even though they are sometimes seen as the realm of visitor management (Yeoman *et al.*, 2004; Weidenfeld and Leask, 2013). As events are temporary, time-limited visitor experiences, sometimes described as 'moment of truth' experiences, there is much diversity in event types and consequently a wide range of VM requirements. These often include the consideration of capacity issues such as determining the scale and duration of the event, venue or site selection, access management, ticketing and visitor flows; visitor characteristics including motivations and behaviour; event-specific issues such as ticketing, security, risk management, first aid and emergency procedures; as well as communication and signage, food and beverage, and VIP and media requirements. Indeed, unlike VM in a destination where there is often considerable



public stakeholder input, VM at events tends to be done by specialized event management companies.

There are also future challenges in VM that could not be covered in this book. These are mainly due to two developments: changes in (tourism) demand and technological advances. Demand, tourist types and related behaviours are subject to demographic developments and thus liable to change. The ageing of Western and developed societies are significant drivers of change, as are the socioeconomic transformations that make travel accessible to larger numbers of people. Further, perceptions of the sustainability of travel already affect the ways in which people engage in tourism. Indeed, as determinants of VM requirements for all stages of a trip, these factors must be considered in the adaptation of visitor sites, attractions and destinations in order to maintain their competitiveness. Related changes in visitor impacts are likely to ensue.

Technological advances and the possibilities they offer to destinations and businesses must be considered in order to appreciate future VM. Going beyond the mere provision of online information, many businesses and destinations already engage with prospective and actual visitors through new and evolving media. Some destinations already make use of the changes resulting from automatization, computerization and hyper-connectivity to shape visitor experiences covering most aspects of a trip from information search, booking, transport, in-destination and post-trip behaviour. By considering these current and future issues in visitor experiences and VM, this book will hopefully prove informative and inspirational for VM practice as well as research.

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# Visitor Management in Tourism Destinations

Edited by Julia N. Albrecht

Visitor management may be considered as a component of destination management at all levels of a destination. It involves a wide range of stakeholders. This book demonstrates current knowledge on visitor management.

*Visitor Management in Tourism Destinations* provides insight into critical concepts such as the visitor experience, service quality, the uses of indicators and frameworks, and interpretation. It also addresses current issues including the social and political dimensions of visitor management, the implementation of monitoring, vandalism, and augmented reality.

Authored by leading international researchers in the field of visitor management research, this book is primarily aimed at researchers and postgraduate students.

Key Features:

- Considers critical concepts and influential factors in visitor management.
- Illustrates current issues in visitor management.
- Research-based case studies contribute to an overall understanding of core issues.
- Covers the state of the art in guiding and interpretation.

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