

FIELD STUDIES IN TOURISM – NECESSITY AND IMPLEMENTATIONS

MILEN PENERLIEV

ASSOCIATE PROFESSOR, PHD
UNIVERSITY OF SHUMEN "KONSTANTIN PRESILAVSKI"
DEPARTMENT "GEOGRAPHY"

BULGARIA

PENERLIEV@YAHOO.COM

ABSTRACT: THE ARTICLE EXAMINES THE PLACE OF FIELD STUDIES IN THE SCIENTIFIC RESEARCH CONCERNING THE TOURISM INDUSTRY, JUSTIFYING THE NECESSITY OF EXTENSIVE FIELDWORK AND ANALYSIS WITH REGARD TO A BETTER MANAGEMENT AND DEVELOPMENT OF THE SECTOR. SOME BASIC FIELD STUDY METHODS HAVE BEEN INDICATED, SUCH AS THE SURVEY (QUESTIONNAIRE), THE PARTICIPATING OBSERVATION, THE INTERVIEW, SOME STATISTICAL AND MATHEMATICAL METHODS, ETC. THE MAIN FEATURES OF THE SUBSEQUENT PROCESSING OF THE GATHERED PRIMARY INFORMATION HAVE ALSO BEEN DISCUSSED.

KEYWORDS:

SCIENTIFIC RESEARCH, TOURISM INDUSTRY STATISTICAL AND MATHEMATICAL METHODS.

In the modern globalized world where information reaches us in real time and where we travel virtually in different countries and continents and communicate from a distance, the following question becomes increasingly pressing: is it necessary for us to travel, to explore new territories, to face real physical, geological, climatic and socio-economic processes and phenomena in the environment? The answer seems clear. In the crisis year of 2011 alone, the growth in the number of tourists worldwide was 4 % and reached 980 million people. In 2012, another 4% were added to that growth, thus passing the threshold of 1 billion people. In 2015 this threshold was already surpassed. And the tourist is curious, requesting authentic touch to different experiences, new cultures, willing to enrich their knowledge of nature, the city, the village and even space. Therefore, tourist behavior, the state of tourist destinations and the evaluation of tourism resources, should be studied. In order to succeed in this venture, field methods are applied.

Classification of scientific field studies in the tourism sector.

According to Isachenko¹ (2004), the geographical (tourist) travel, the expeditionary and the stationary studies, fall into the group of immediate observations methods in modern science. In turn, those methods are the ones whose application ensures the conducting of field studies. That is why they need further definition.

Geographical (tourist) trips are a kind of observations, which present to the participants different geographic objects and phenomena, mostly by applying the excursion form of travelling. Based on a pre-established, time-scheduled, thematic plan, the studied objects are described, photographed and mapped.

Expeditionary observations are related to solving a previously placed scientific problem (the study of a particular territory, phenomenon, etc.) The preparation requires

¹ Isachenko, Metodologia na geografskata nauka, Moskva, 2004

provisioning of specific scientific equipment and supplementary materials such as thematic maps, monitoring forms, etc.

Stationary studies represent observations in a specific geographical area. They aim to establish the change in the dynamics and the trends in the development of a particular object or phenomenon. More sophisticated scientific equipment is required in this case. Such methods, for example, are the observations carried out in climatic, hydrological or mareographic stations. From the standpoint of geographical practices, these methods are the most complicated in terms of preparation, conduct and performance considering the increased requirements to the head of the research and to the participants in such an undertaking.

The defined herein method types of scientific observation largely facilitate the classification of field studies. If we start from the genesis of these concepts, we can group the discussed studies into the following three categories: 1) **geographic (tourist) trips**, 2) **expeditionary observations** and 3) **stationary studies**.

Depending on the purpose of the field geographical practices they can be **thematic or complex**. If we examine a single tourism resource in a given region, we are likely to consider such an activity as a thematic field study; or if we examine the attitude of tourists to a tourist site (region, destination, service). If we decide, however, to examine the overall tourism potential of a given territory (resources, labor, accommodation facilities, etc.) that would be regarded as a good example of a complex field study.

When choosing different types of field studies, there are certain similarities. All field studies exhibit the same stages of their implementation. Whatever the purpose or theme of the geographic field trip, each one passes through three stages: preparation, actual fieldwork and cameral work (subsequent analysis) (Fig. 1, Penerliev, 2014²).

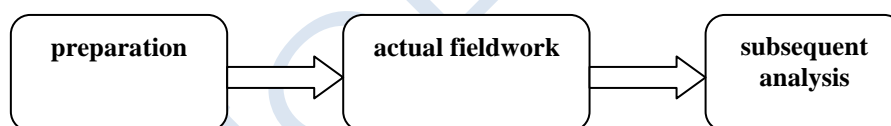


Fig. 1. Stages of the field study.

The attached Figure 2 illustrates the duration of every stage of the field study. It should be noted that the duration is approximate and often goes beyond the adopted time criteria. In this sense, expeditions may continue all season, while the analysis of their results may take years to do. (e.g. polar scientific expeditions). Field trips pioneer new tourist routes. Take extreme alpine tourism for example - it also has a similar effect. Tourist trips are conducted by tour operators in order to test every tourist itinerary. For example, in Japan, when planning school trips (Mihova, Penerliev, Nashikimura, 2011³), representatives of the company-organizer of the trip visit and test in advance each of the locations provided in the itinerary. In fact, the time for planning the field study may exceed that of the actual fieldwork. And this is actually the new trend. As far as stationary observations are concerned, the duration of the studies may not matter – depending on the particular destination and on the purpose of the research, it can continue indefinitely (a week, a month, a season). For example, the author of

² Penerliev, M. Terenni praktiki po obshtstvena geografija /djoben narachnik/, izd. Inkoma, Shumen, 2014, (in bulgarian)

³ Mihova, Penerliev, Nashikimura, Uchenicheskite exurzii – dinamichen – obrazovatelnen metod v Iaponia i Balgaria, Sb. Nauchni trudove „40 godini Shumenski universitet (in bulgarian)“

this material has already been exploring the profile of the Romanian tourists along the northern Bulgarian Black Sea coast for four years now.

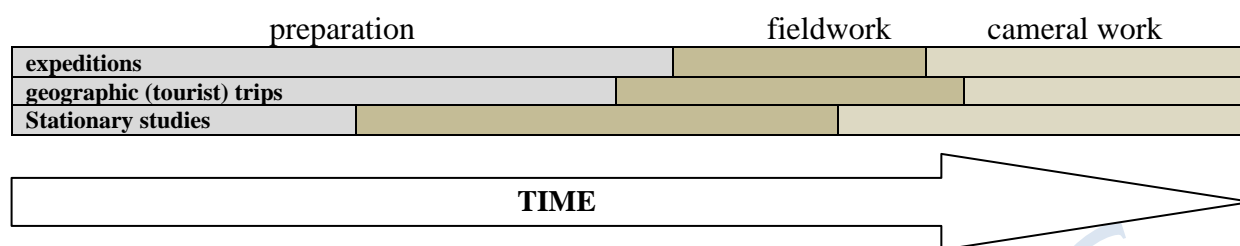


Fig.2 Duration of the different stages of a field study.

Some basic methods in tourism field studies.

Here we present some of the most popular methods applied in field studies. Often, when studying territories, their population remains outside the scope of the study. In fact, it is the population which generates material goods and has created a particular culture, which in turn is a resource for a certain type of tourist activity. The so-called participating observation method is a very good example of how we can explore this side to the tourism industry.

According to Yankova⁴ (2016) **the included (participating or participant) observation** is widely used mostly for the research purposes of cultural anthropology, but the method is especially effective for the needs of other scientific fields as well. In its essence it is a method where the researcher lives among the studied community and participates in its everyday practices, rituals and social interactions. The researcher purposefully observes the studied phenomena, interacts with members of the community (the village, the hamlet, even the hotel staff), interviews, records, documents (photo, video) and so on. The success of the participating observation is due to the quest for maximum "blending" in the studied culture (its mode of behavior) and the nearest possible identification with it. Of course, good theoretical preparation of the researcher is important, as well as their individual qualities (in terms of observation skills, dialogue skills, motivation, specific interests) and in many cases – the researcher's personal characteristics (age, sex, religion, etc.). Thus the researcher is able to achieve a full understanding of the world of the studied group of people, their views and values, all of which in most cases (!) are not shared with strangers and remain hidden from external observers.

In tourism industry, as well as in other areas of services, the participating observation method has gained popularity in the last 5-6 years by introducing the so-called "secret client" activity. A secret client is someone who does sightseeing incognito, using all available services, and based on their observation, fills in special forms where they give their assessment (mostly by using grading evaluation). The observation is used to study the opinion of tourists, the behavior of employees in the field of tourism, the motivation and the recreation activity of tourists, etc. The most used variation of the observation method is the so-called "participating observation" (also called "The Gold Method ") - the observed subjects are unaware of the fact that they are being surveyed. In this case consulting services from specialized companies are often used, since a specially trained observer is required. The methodology of such research is easy (Penerliev, 2011): the overall behavior of tourists, as

⁴ Iankova, V. Metodi i podhodi na temenoto izsledvane, Sbornik Infomacionni resursi po prilojna geografija, tom 2, 2016 (in bulgarian)

well as the performance of the employees in the tourism sector and the quality of services offered, are observed and reflected in a diary, specially designed for this purpose. In the annex of the current paper, an example of the Gold method form used to assess the overall image of the destination (e.g. by a "secret client" hired by a consulting firm). Here we apply a schematic map of a similar study carried out in order to assess a full tour (Table 1).

Table 1. *Observation form for evaluation of a full tour
(used by the Gold method).*

criteria	Very good	Good	Unsatisfactory	Comments
1. Selection of the places visited				
2. Assessment of the tour guide lecturing				
3. Tour guide behaviour				
4. Level of language conduct				
5. Assessment of the catering				
6. Assessment of accommodation facilities				
7. Quality of transportation services				
8. Overall impression of the excursion				
9. Duration of the excursion				
10. Total pricing of the excursion				

Quite often it is necessary to check the tourists' evaluation (or that of locals) of a given tourist destination service which is being offered. The most recognised method of assessment of in that case is the questionnaire survey. There are different types of surveys and different techniques for their processing. The basic requirements are that the questionnaires are brief and clear, giving clarification on what the respondent should do, without taking much of the respondents' time, and that they are well-prepared and properly structured.

Here we give a survey example of applying the grading assessment of various indicators as suggested by the so-called " Likert Model " (Penerliev, 2011⁵). Our main objective is to check the assessment of the local population of their settlement's development as a tourist center (see the attached questionnaire). According to this scheme, we can assess the insight and impression of tourists obtained from the proposed additional service or from a given tourist product. The questionnaire was based on a series of impact factors (Fig. 3). There is an option for the respondent to provide an evaluation (usually from 1 to 6; in the attached questionnaire - from 1 to 7).

After conducting the survey, the initial analysis follows. For each listed item an average grading evaluation is done, followed by creating of a so-called " Likert Scale " (Figure 3).

⁵ Penelriev, M. 2011. Geografia na turizma, izd. Teress proekt, Shumen (in bulgarian)

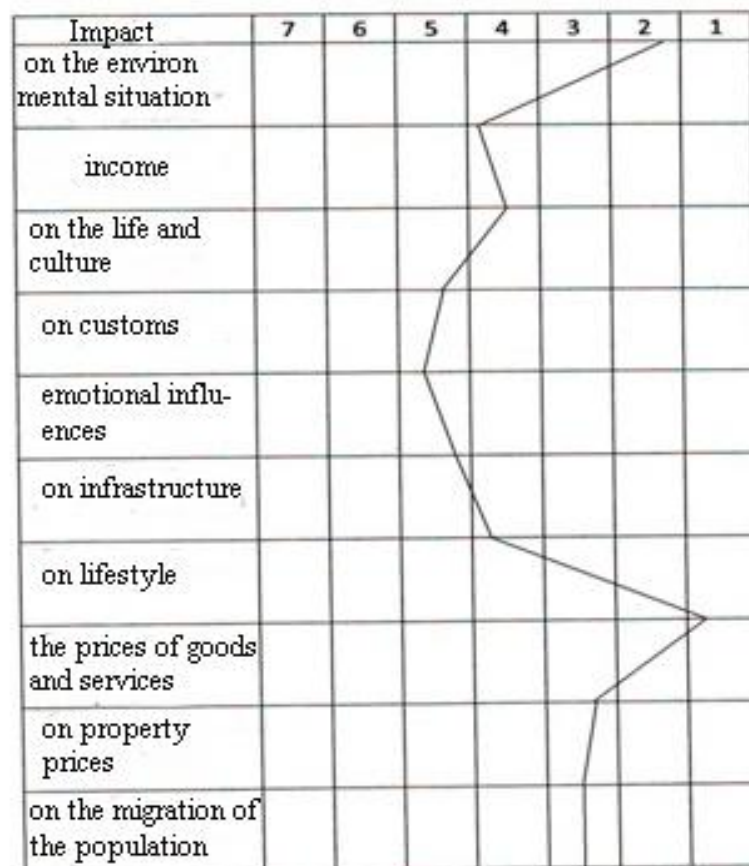


Fig. 3. Likert Scale of tourism impact in Tryavna, Bulgaria.

The Likert Scale clearly shows which indicators have a positive impact on the tourist center (or tourist service) or the opposite – which factors need further analysis and development of new products and services are necessary. A crucial moment in the survey analysis is the correct interpretation of the results (in this case – of the Likert Scale). Based on the right conclusions, appropriate decisions aimed at improving the tourist product are made. For example, in the attached scale (Figure 3), the local population gives a very low evaluation of the environmental situation since the start of tourism development (the first indicator). In that case, provided that the survey was commissioned by the municipal authorities, the latter should make management decisions on environmental protection and implementation of environmental policy in the example tourist destination.

The use of mathematical methods in the actual fieldwork is limited. Most often those methods are used in the subsequent analysis after the completion of collecting primary “on-site” information. Nevertheless, here we adduce a simple mathematical model often applied “on-site” during field studies - namely - the index of localization.

In order to determine the position of a given sector of the economy in the local economy or its share of the national economy, the "localization index (IL)" formula is used:

$$IL = \frac{S_j : S}{N_j : N},$$

where S_j is the number of employed in the studied economic sector in the region (e.g. in agriculture in Dobrich district as part of Dobrudzha region);

S is the number of the employed in the primary economic sector in the region

N_j is the number of the employed in the agriculture nationwide

N is the number of the employed in the primary economic sector nationwide

In cases where the index is over 1 – the studied economic sector is considered leading, shaping the economic profile of the region. Regarding the tourism industry, those are mono-functional settlements in terms of economic development. For example, such is the case of Sozopol, Nesebar, Pomorie, Varshetz, etc. Those settlements define their image and economic development potential on the basis of tourism development only. Provided that after applying this mathematical model a negative trend is detected, this means that the settlement's problems are significant.

In tourism field studies, **methods of observation and information provision** are also used. This group of methods was aptly defined by Isachenko (2004) as the most important one, since it is a source of primary information on which conclusions, hypotheses and theories are built. These observations can be immediate (in cases of direct contact with the studied object) or mediated (remote).

The group of immediate observations encompasses the geographical (tourist) travel, the expeditionary and the stationary studies. Each of those has its own characteristics and its own concrete research methods. Which of those methods is going to be used depends on the objective of the scientific task. Those methods were mentioned earlier in the current paper.

Remote sensing methods allow visual observation of the Earth's surface with a specific purpose. These methods are divided into aerial and space methods, where the division is based on the different resolution of the images, their scale and height of shooting.

An important feature in this group of methods is the mandatory requirement for reporting the observations results - the conduct of a research (observant) diary, the designing of profiles and the shooting of objects is mandatory and an integral part of the field research and expeditions. Therefore, for clarity and easier handling of the obtained primary information, forms, tables and other means of database input are designed upfront. The database in this activity additionally includes "on-site" maps showing the studied objects/locations as well as laboratory analysis of soil and air (if necessary), collecting of rock samples in a specific sequence, cultural tourism artifacts, mapping of caves for the purposes of speleological tourism, remote sensing of rivers for the purposes of whitewater rafting, etc.

In the modern era of "information avalanche", no study can only consist of primary data acquired in the field. The so-called "secondary information" obtained from various sources is important as much as the primary data. The secondary data includes various thematic maps, statistical data of different nature from different institutions, GPS maps and information, etc. The provision of this huge "avalanche" of diverse information results from the development of information technology and geo-informatics as a discipline (even as a scientific field), providing the scientific research. Various software products for the processing of primary information exist such as Statistica, SPSS, Matlab, etc. The GIS (Geographic Information Systems) programs have a significant research importance. Specific software such as ArcGIS, MapInfo and others, relate a wide range of database to various cartographic bases, resulting in a variety of thematic maps. This way GIS integrates data suitable for regionalization, zoning, monitoring, demographic and socio-economic observations, etc.

Cartographic method. This is a method used in geographical science, which is present in almost all scientific disciplines. Therefore, we assume that the types of maps and methods for displaying are familiar to the student-researcher. It is important to know that the geographic map accompanies the field studies in all its stages. The map is an observation document, as well as a source of information which is a most appropriate way of depicting the results from the direct field observations. In this respect, as early as the planning of the field trip, it is necessary that we are equipped with a map of the area we are about to explore, as well as a map sheet of the same territory, on which we immediately place the observed objects. This is of particularly importance in mountain tourism, speleological tourism, ecotourism, etc.

In the current paper we pointed out only a small part of the scientific instruments for field research in tourism. The implementation of each of these methods, as well as various other ones not mentioned here, should be done after a preliminary assessment of the objective and the tasks of the study. The successful implementation of such a field study also depends on the correct subsequent analysis of the collected initial information. This part of the research in tourism will be the subject of another publication.