

A COMPARATIVE ANALYSIS OF ECOTOUR GUIDING ON CRUISE BASED TOURS

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Abstract

Two cruise-based nature-oriented tour operations, CruiseWest, operating along the Inside Passage of Alaska, and Lindblad Special Expeditions, operating in the Galapagos Islands, provided the data for this case study of nature-based guiding associated with the cruise industry. Both companies are leaders in the nature-based tourism industry, both offer upmarket weeklong cruise-based tours guided by both on-board expedition leaders and shore-based guides, and both operate relatively small ship-based ecotourism experiences to destinations known to be popular with tourists who want to view close-up and interact with wildlife.

One-week excursions with each of the companies, in June 2000 (Alaska) and September 2000 (Galapagos), provided the case study material for the research. Using methods that were piloted as part of a previous research project, guides were systematically observed with the assistance of a standardised observation checklist, and passengers completed a self-completed questionnaire on the final day of their one-week tour. In the end, data were collected on 12 guides (shore-based excursions) and 2 expedition leaders. Questionnaires were completed by 55 of the 68 adult passengers on-board the Spirit of Alaska (CruiseWest), and 21 of the 26 adult passengers on-board the Polaris (Lindblad). The focus was on the quality of the guiding and the elements of the guided activities that contributed to the success of the operation as an ecotourism experience, and to visitor satisfaction.

This paper is a work in progress. Material in the paper cannot be used without permission of the author.

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INTRODUCTION AND CASE STUDY CONTEXT

Tourist experiences vary widely, and the means and mechanisms which lead to visitor satisfaction may be as varied as the experiences themselves. In the case of guided tours, there is increasing evidence that the guide is a key ingredient in visitor satisfaction and in a quality experience for visitors, while at the same time playing an important role as mediator between the visitor, the host population and the cultural and natural environment (Geva and Goldman, 1991; Arnould and Price, 1993). However, many visitors travel without ever joining a guided tour, or purchase short (full-day, half-day or less) tour excursions as part of a longer holiday, so the role of the tour guide may be minimal or non-existent in the visitor's total experience. For those who participate in extended (multiple-day) guided tours, the potential influence of the guide on visitor satisfaction is much greater, although even here there is "free time" within such tours to be away from the tour guide and the group, to dine, shop or engage in other recreational pastimes or to do nothing.

A unique aspect of cruise-based tourism is that visitors have limited opportunities to be free from the guided experience. Thus, guides on cruise-based tours may make a significant contribution to visitor enjoyment, as well as be a major factor in an unsatisfactory experience. In the case of a cruise-based nature tour, it is hypothesized that the guide is *the* major facilitator of learning, interaction with the natural and cultural environment, responsible on-site behaviour and long-term conservation goals.

This study sought to explore visitors' perceptions of the role of the tour guide in cruise-based ecotourism and the factors associated with quality tour guiding and visitor satisfaction. In the absence of any previous research with this focus, an inductive approach was taken, using a case study of nature-based guiding on two cruise-based tours, one in Alaska in June 2000 (operated by CruiseWest, based in Seattle) and the other in the Galapagos Islands in September 2000 (operated by Lindblad Expeditions, based in New York).

Both were week-long tours offered by companies who are leaders in the nature-based tourism industry, and who offer upmarket cruise-based tours guided by both on-board expedition leaders and shore-based guides. Both use relatively small ships (capacity of 80 to 100 passengers) to destinations known to be popular with tourists who want to view wildlife close-up and to have opportunities to interact with nature. In addition to Alaska and the Galapagos Islands, CruiseWest and Lindblad Expeditions offer cruises to other destinations including the Columbia and Snake Rivers in the northwestern U.S., Baja California, Mexico, Costa Rica, Panama Canal as well as in Asia and the South Pacific. Their clientele appear to be largely retired or semi-retired professionals who prefer small vessels that maximise opportunities for easy access to nature and close encounters with wildlife that larger ships cannot offer. A deep interest in nature and culture prevails in the types of cruise experiences they seek.

The research project aims to identify the essential elements of quality nature guiding on cruise-based ecotours, and to explore what factors influence the quality of guiding on such tours.

THEORETICAL AND METHODOLOGICAL UNDERPINNINGS: DEFINING QUALITY IN NATURE-BASED TOUR GUIDING

Conceptually, the role of a nature-based tour guide on board a cruise ship would seem to be no different to a nature-based tour guide on land. However, this has not been tested empirically, as there has been limited

research on the roles and attributes of tour guides, in general, and even less on the elements of good nature-based tour guiding.

In particular, limited research has been conducted from the visitor's perspective as to what makes a quality guide or a quality guided ecotour experience, and even less research has been conducted on tour guides conducting cruise-based nature tours.¹ In order to contribute to theory-building on quality nature-guiding, a case study approach was used (Hartley, 1994; Yin, 1994). As will be discussed shortly, we had some findings from other ecotour guide research on the qualities and competencies required of ecotour guides, but there has been little or no empirical testing of their relevance outside Australia and their applicability to cruise-based guiding. How visitors perceive guiding and how quality nature tour guiding contributes to visitor satisfaction are poorly understood constructs.

The first aim of the present paper is therefore to examine the visitor's perspective on "the qualities essential in a good tour guide", and in particular, the guides who lead the shore-based excursions offered as part of the cruise. A second aim of the paper is to examine the visitors' perspectives on the guides' performance, i.e. the quality of the actual guiding. Due to the inductive and exploratory nature of the case study approach, some of the data collection was intentionally atheoretical, allowing visitors to express in their own words their perceptions of "the essential qualities of a 'great' guide". Part of the data collection was informed by the literature and previous research on the principles of effective interpretive guiding (Weiler and Ham, 2001). These principles were used to identify variables on which to assess individual guides' performance, both by visitors and the researchers.

The variables against which we assessed the performance of individual guides were selected based on attributes that have been found to be important elements of quality nature guiding (Weiler, 1999). For the observational instrument, these were wide-ranging and comprehensive.² For the visitor's self-completed survey instrument, these were limited to those on which we felt visitors could make a judgement.

FIELD METHODS: SAMPLING, DATA SOURCES, DATA COLLECTION AND DATA ANALYSIS

Sampling

There are only a handful of cruise-based tour operators who specialise in the nature-based or ecotourism market, for at least two reasons. First, there are high start-up costs and requirements that limit entry into this market. Second, there are limited business opportunities in terms of suitable destinations, outstanding product and target markets that can afford both the time and money required for this type of experience.

Given the limited number of operators combined with our own practical constraints in conducting this research, the choice of companies for the case study was limited. The two companies selected met a number of criteria.

1 An exception is a study conducted two decades ago by Koth et al. (1981) which examined the strategic role of interpretation in different phases of the cruise experience. Although discussions of interpretation in cruise experiences occasionally appear in the literature (see, for example, Ham 1992, Case 1992, and Ham 1985), virtually no systematic attempts have been made to understand cruise-based guiding.

2 Methodologically, the assessment of an individual guide's performance during an actual tour required the adaptation of performance appraisal and workplace assessment techniques. The foundation for this part of the research was initiated in an earlier study (Weiler, 1999) and refined in a recent project developing a national certification program for nature-based guides in Australia (Black et al., in press). The instruments and techniques for observing and recording performance were informed by a body of literature developed largely from workplace assessment in more conservative and predictable work environments such as office settings, and industries such as manufacturing (Hagar et al., 1994; Rumsey, 1994; Kearney, 1997), so transferring these concepts to the diverse environments in which tour guides work was challenging. Operationalising and measuring quality nature tour guiding was made even more challenging in the current study which involved a comparative research design in two very different political, cultural and environmental contexts.

The first criterion was a business that was nature-based in philosophy, orientation and operation. Both companies included in the case study offer a product that is largely nature-focussed, including destinations known to offer outstanding natural features such as wildlife, unique geological features and beautiful scenery. Included in this criterion was the use of smaller vessels in order to navigate tight or shallow stretches, itineraries that focus on getting close to nature and wildlife, and a guided experience that is focused on a quality nature-based experience for a relatively small number of passengers. A high staff-client ratio with at least some staff that were recruited and trained as naturalists/interpreters/ecotour guides was considered important.

The second criterion was a business that was successful and reputable as not only a nature-based operator but as an ecotour operator, in other words, a company that espoused and practised responsible and sustainable tourism toward both the natural and cultural environment, both in the short-term (minimal impact) and the long-term (conservation). A target market that was motivated by these attributes and willing to pay for a high quality experience was part of this criterion.

A third criterion was the need to be able to gain access to the tours, the guides and the clients to collect data in a timely and cost-effective manner. These practical constraints had to be balanced by our desire to focus on at least two tour products that were different enough (i.e. more than one company and location) and yet similar enough in tour length, product, price, and clientele to facilitate cross-tour comparisons.

Based on these criteria, we were successful in securing access to two week-long tours, one offered by CruiseWest (formerly Alaska Sightseeing, Inc.) based in Seattle and the other offered by Lindblad Expeditions (formerly Special Expeditions) based in New York.

While the use of the case study approach often precludes generalisation of findings to a wider population, there is such a small number of operators in this business that we feel confident that our results will be of interest and relevance to all cruise-based operators interested or involved in the specialist nature-tour market. Similarly, while some argue that the case study approach is largely limited to descriptive analysis, others claim that the in-depth nature and emphasis on situationally-embedded processes justifies some level of causal inference (Lee et al., 1999: 54). We used multiple data sources and methods in order to maximise this opportunity.

Data Sources and Methods

The data sources and methods used included secondary data (guide books, websites, tour brochures), participant-observation of two week-long tours, systematic observation of guides on board and on shore excursions, and passenger self-completed questionnaires. The remainder of this paper focuses on details of the methods and selected findings from the passenger questionnaires.

Passengers were given a four-page self-completed survey to complete at the end of their seven-day tour. They were, however, informed at the beginning of the tour that they would be asked to complete a survey about their experiences, and that the survey focused on the qualities of the guides and the guided tours offered as part of the cruise. In the questionnaire, visitors were asked to:

1. provide socio-demographic details
2. list three qualities essential in a “great” shore excursion guide
3. rank order the top five excursions on which they participated in terms of their satisfaction with the excursion
4. circle phrases from a list that they felt described the performance of the guide on each of these excursions
5. provide an overall assessment of whether they were “glad” they joined each excursion and whether they would recommend it to others
6. make any additional comments about the guides

With regard to the phrases in point 4, our intent was not to measure *degree* of passengers' feelings about their guides, but rather to determine what types of defining qualities or evaluative criteria they associated

with the guides' performance. Essentially, each phrase or adjective in the 16-item list was the polar extreme of one of 8 semantic differential scale items, each tapping a different dimension of tour guide quality. As mentioned previously, the dimensions chosen were based on widely agreed upon principles of effective interpretive guiding. However, to minimise the effort required of the passengers, we omitted the standard semantic differential format with 7-point ratings and used only the polar opposites. Thus, respondents were provided with the 16-item list of qualities they might attribute to their shore excursions (e.g., boring, entertaining, made things relevant, didn't make things relevant, etc.) To avoid patterned responses, the 16 items were presented in jumbled order. This also allowed respondents to circle *both* descriptors of a scale item (e.g. "gave too much information" and "gave too little information") *or neither of them*, and eliminated "forced choice" responses. Out of 16 descriptive phrases, five were favourable (desirable) qualities and nine were undesirable, partly in order to encourage critical feedback, as visitors are disinclined to be critical when giving feedback on tours (Geva and Goldman, 1991; Weiler and Ham, 2001).

PRELIMINARY AND SELECTED FINDINGS: THE VISITOR'S PERSPECTIVE

Questionnaires were completed by 55 of the 68 adult passengers on-board the Spirit of Alaska (CruiseWest), and 21 of the 26 adult passengers on-board the Polaris (Lindblad), representing a response rate of 81% for both.

The following are selected findings from the passenger survey, namely the socio-demographic profile of the respondents on the two tours, responses regarding the essential qualities of an ecotour guide leading excursions on cruise-based tours, and visitors' perceptions regarding the performance of the guides on these tours.

Socio-demographic Profile of Respondents

The profile of visitors on the two tours had some notable similarities as well as some differences (see Table 1). Variables for which differences between the two profiles were not statistically significant include gender (a fairly even split) and country of origin (overwhelmingly American). The passenger profiles did differ significantly, however, with respect to age, education level, employment status, occupation, previous cruising experience, and travel party profile. The CruiseWest passengers were, on the whole, older (63% were 55 years and over) and less experienced cruisers, with lower levels of education, and with more (42%) in the clerical/sales and trade/labourer occupational categories than the Lindblad passengers (16% in these occupational categories). They were more likely to be retired (51% compared to 20% of Lindblad passengers), and less likely to be travelling with children (24% compared to 40% of the Lindblad passengers).

Table 1: Socio-Demographic Profile of Respondents on CruiseWest (Alaska) and Lindblad (Galapagos Islands) Cruises

Variable	Percent (%) (Alaska)	Percent (%) (Galapagos)	Variable	Percent (%) (Alaska)	Percent (%) (Galapagos)
Gender			Country of Origin		
Male	47	52	USA/Canada	95	95
Female	53	48	Australia/NZ	5	0
			Other	0	5
Age			Number of previous cruise trips taken		
15-24	2	14	0	38	28
25-34	7	10	1	25	5
35-44	13	29	2+	37	67
45-54	15	14			
55-64	33	10			
65-74	17	19			
75-84	13	5			
Education level			Travel with		
Some high school	4	5	Spouse/partner	67	45
High school	11	5	Family/children	24	40
Some college/uni.	24	5	Parent	4	15
Bachelors degree	18	14	Friend/other	5	0
Some post/grad	15	14			
Higher degree	28	57			
Employment			Occupation		
employed	38	65	Professional/mngt.	52	68
retired	51	20	Clerical/sales	22	11
unemployed	5	0	Trade/labourer	20	5
self-employ/other	6	15	Homemaker/student	6	16

Essential Qualities of a Shore Excursion Guide

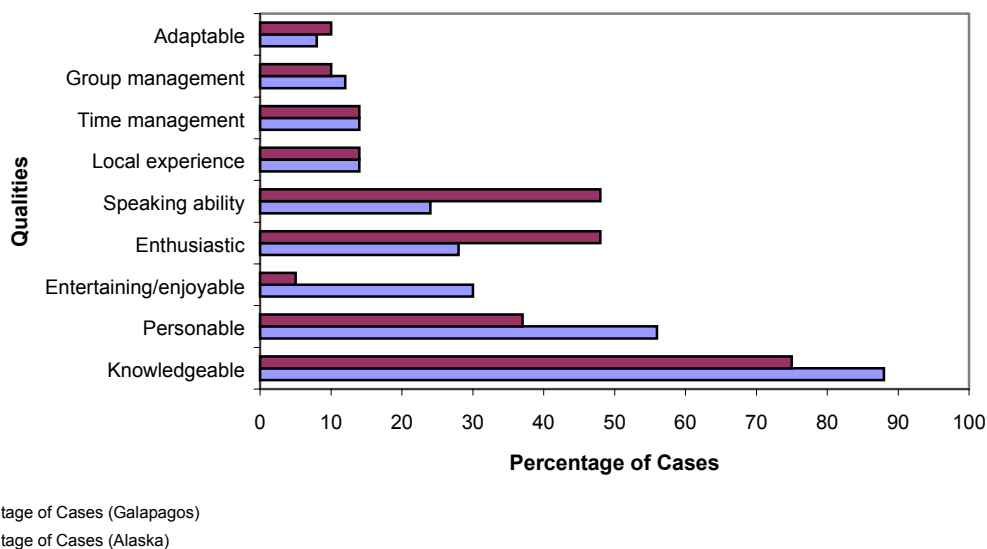
Responses to this open-ended question were obtained from 50 CruiseWest passengers and 21 Lindblad passengers. The three qualities mentioned by each of the respondents were grouped into categories representative of the words/phrases used by respondents (see Table 2), and are reported based on the percentage of respondents who mentioned each quality (See Table 3 and Figure 1).

Table 2: Qualities Respondents Consider Essential in a “Great” Shore Excursion Guide

Actual words used by respondent:	Categorised as:
Knowledgeable Informed, informative content Precise and accurate information Important information	Knowledgeable
Good/excellent communication skills Good speaking/microphone voice Ability to present Articulate Speaks slowly/loudly/clearly	Speaking skills
Entertaining style Good stories Uses questions and answers Humorous, fun Varied/interesting delivery	Entertaining
Enthusiastic	Enthusiastic
Personable, personality Friendly, pleasant manner Good rapport with customers Courteous Approachable	Personable
Experienced Local/personal experience	Experience
Prompt, starts on time Allows enough time	Time management
Adaptable Versatility Empathy	Adaptable
Group management Effective leadership Inclusive of all persons	Group management

Table 3: Essential Qualities of a Shore Excursion Guide

Qualities	*Percentage of Cases (Alaska)	*Percentage of Cases (Galapagos)
Knowledgeable	88	75
Personable	56	37
Entertaining/enjoyable	30	5
Enthusiastic	28	48
Speaking ability	24	48
Local experience	14	14
Time management	14	14
Group management	12	10
Adaptable	8	10
* Percentage of respondents who wrote this as one of their three qualities		
*50 valid cases; 5 missing cases		
* 21 valid cases		

Figure 1: Essential Qualities of a Shore Excursion Guide (Alaska vs. Galapagos)

The results show that 88% of the CruiseWest passengers and 75% of the Lindblad passengers mentioned “knowledge” as an essential quality of a “great” excursion guide. This was by far the most frequently mentioned quality. Other frequently mentioned attributes were “personable”, “entertaining/enjoyable”, “enthusiastic” and “speaking ability”. It is interesting, however, that the two groups of respondents differed with respect to some of these attributes. For example, 30% of CruiseWest respondents identified “entertaining/enjoyable” as one of their three essential qualities of a shore excursion guide, while only 5% of Lindblad respondents selected “entertaining/enjoyable”. Nearly half of Lindblad respondents mentioned “enthusiastic” and “speaking ability,” while the proportion of CruiseWest respondents who mentioned these two qualities was closer to one-quarter. On the surface, these results might lead one to conclude that

CruiseWest passengers want more “entertainment” from their guides whereas Lindblad passengers are more willing to accept unentertaining guides as long as they can “speak well” and are “enthusiastic”. However, previous research suggests that the two sets of findings cannot be interpreted in such a simplistic way. Past research clearly shows that “enjoyment” is central to a tourist’s experience, including its interpretive dimensions (see for example Cameron and Gatewood, 2000, Arnould and Price, 1993, Ham, 1992, and Ham and Shew, 1979).

The difference may in fact lie in the various ways that tourists define and perceive an “enjoyable” experience. Thus, a more likely explanation of the results is that the two groups differ experientially with respect to how “entertainment” by a guide fits into the experiences they seek. An alternative explanation could be that passengers in the Lindblad passengers were more adept at isolating the components of speaking ability and enthusiasm (both arguably related to entertainment value) as contributors to a guide’s performance, whereas CruiseWest passengers (with lower education and less cruising experience) were less capable of making this connection. Future research might focus on testing these hypotheses.

Performance of Excursion Guides

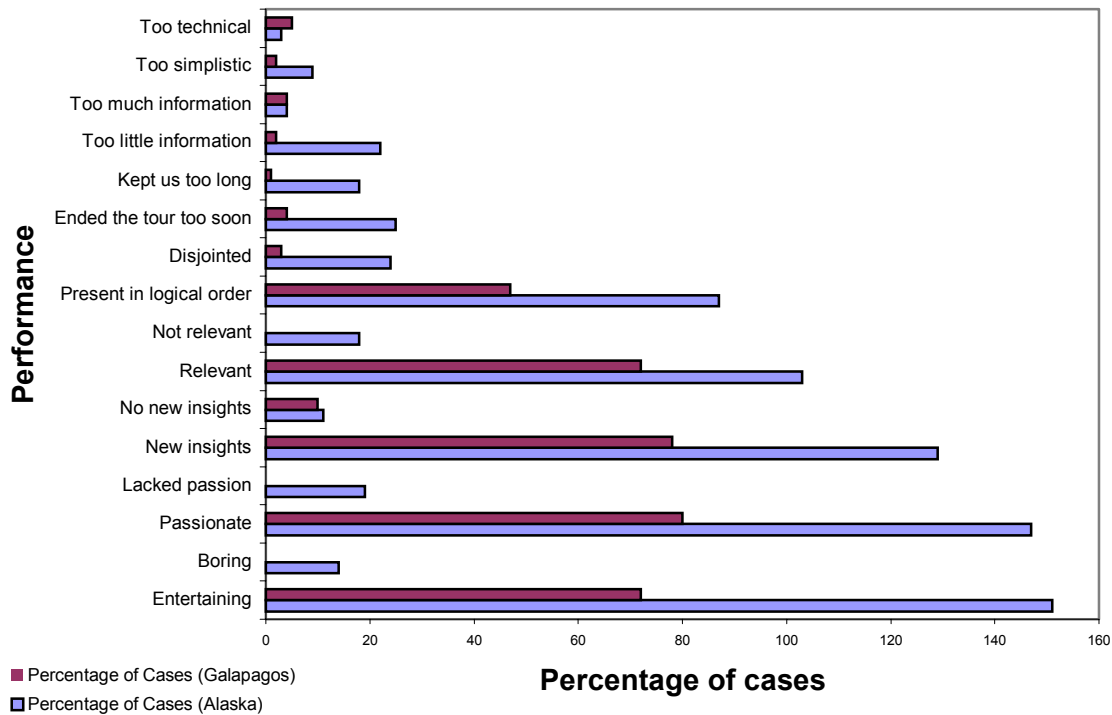
In addition to stating what they felt were ideal qualities in a guide, respondents were asked to assess the performance of the guides that led their shore excursions. As described earlier, for each excursion respondents could circle between zero and sixteen phrases that represented attributes of the guided tour experience, of which five were favourable descriptors and eleven were unfavourable. All responses to all tours assessed by respondents were totalled, and the number of responses on each descriptor are shown. Table 4 shows the 16 descriptors in descending order based on how frequently they were mentioned by respondents, even though they were not presented this way in the questionnaire. It illustrates that responses were highest for both respondent groups for the five descriptors that were favourable (entertaining, passionate, new insights, relevant, and presented in a logical order). In the case of Lindblad respondents, for three of these, the polar opposite (boring, lacked passionate, not relevant) received zero responses – i.e. not a single respondent said that these three descriptors applied to any of their guides, a truly remarkable finding. Again in the case of Lindblad respondents, for several other descriptors, (too simplistic, kept us too long, disjointed, and too little information) there were very few (15 or fewer) responses.

Table 4: Performance of Excursion Guides (Alaska vs Galapagos)

Guide Descriptors:	Percentage of cases (Alaska)	Percentage of cases (Galapagos)
Entertaining	151	72
Passionate	147	80
New insights	129	78
Relevant	103	72
Presented in logical order	87	47
Disjointed	25	4
Ended the tour too soon	24	3
Too little information	22	2
Lacked passion	19	0
Kept us too long	18	1
Boring	18	0
Not relevant	14	0
Too simplistic	11	10
No new insights	9	2
Too much information	4	4
Too technical	3	5

Figure 2 also clearly illustrates the overwhelmingly positive view respondents have of their guides. It also illustrates that, according to the passengers, Lindblad guides outperformed CruiseWest guides on these particular tours, a finding that is consistent with our systematic observations of the guides.

Figure 2: Performance of Excursion Guides (Alaska vs Galapagos)



Although minor variations between the Alaska and Galapagos samples exist, the passengers generally agreed on the positive criteria used to evaluate their guides. Since visitors' overall satisfaction ratings of their guided tours were high, these data suggest that the most common distinguishing characteristics of quality guides are that they are passionate, insightful, entertaining, relevant and easy to follow (i.e., are able to present things in a logical order). Likewise, passengers' most frequent open-ended statements about the attributes they associate with a "great guide" included similar criteria (e.g., being knowledgeable, skilful at speaking, passionate and enjoyable). These findings, while not conclusive, suggest that training and evaluation of guides might to some extent emphasize these desirable qualities.

CONCLUSIONS, AND WHERE TO FROM HERE

We proposed at the outset that guides on cruise-based tours make a significant contribution to visitor enjoyment, and can also potentially be a major factor in an unsatisfactory experience. In the case of a cruise-based nature tour, it was hypothesized that the guide is *the* major facilitator of learning, interaction, responsible on-site behaviour and long-term conservation goals.

Our findings to date suggest that visitors on these two tours at least have definitive views on what qualities are important in a guide, and are overwhelmingly positive about the quality of the guiding they experienced on their cruise. Once we add the other data on visitor satisfaction, the qualitative data (both visitors' open-ended comments and our own participant-observation data), the secondary data analysis, and the quantitative measures of the guides using our observation checklists, we will be able to tell a much fuller story about the role of the guide on cruise-based ecotours, and the factors associated with quality tour guiding and visitor satisfaction on such tours. Our continuing analysis of the data will focus on achieving a better understanding

of what constitutes “quality” in ecotour and how methods both for training and evaluating guides might be responsive to these criteria.

There is widespread agreement that guides play a pivotal role not only in the quality of the ecotourist’s experience, but in facilitating the conservation goals of ecotourism. Sven Olof Lindblad, owner of Lindblad Expeditions, proclaimed in a recent fundraising campaign for the Galápagos Islands that “it will be the passion and insistence of the traveller that will ultimately save the world’s special places” (Ham and O’Brien 1998). Lindblad’s prophecy highlights the central role and potential influence that ecotour guides have. Quality ecotour guiding, creatively packaged and powerfully delivered via the interpretive approach, will go a long way to ensuring that ecotourism does indeed contribute to saving the world’s “special places”.

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