

SPATIAL AND ORGANIZATIONAL DYNAMICS

DISCUSSION PAPERS

Challenging Services

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The "Double Transition" in the Learning Identities of Primary School Teachers

Dupla Transição Biográfica nas Identidades de Aprendizagem de Professoras do 1º Ciclo do Ensino Básico
Joaquim Arco and António Fragoso

Parenting Alliance Among Mothers of Psychosocially At-risk Families

Aliança Parental em Mães de Famílias em Risco Psicossocial
Lara Ayala Nunes, Cristina Nunes and Ida Lemos

Institutional Theory in Tourism Studies: Evidence and Future Directions

A Teoria Institucional nos Estudos Turísticos: Evidências e Direções Futuras
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Renato N. Pereira, Joaquim da Costa Leite and João Albino Silva

DISCUSSION PAPERS N° 13: SPATIAL AND ORGANIZATIONAL DYNAMICS

Challenging Services

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THE “DOUBLE TRANSITION” IN THE LEARNING IDENTITIES OF PRIMARY SCHOOL TEACHERS

DUPLA TRANSIÇÃO BIOGRÁFICA NAS IDENTIDADES DE APRENDIZAGEM DE PROFESSORAS DO 1º CICLO DO ENSINO BÁSICO

Joaquim Arco
Antonio Fragoso

ABSTRACT

This paper intends to reflect the ways in which eight primary school teachers constructed their learning identities in different contexts of their life courses. Different forms of learning suggest that educators faced hard transitions in their learning identities and careers. The biography of each interviewee was a dynamic process in which each used all their skills to build their own life's trajectory. These educators had no fixed identities; they changed and became different persons. In each new situation their identities are (re) built, updated and modified. In each situation new experiences are encountered, which are integrated by the subjects in the process of biographical (re) construction. Each educator used their knowledge, their motivations and their experiences to build her/his biographical learning in a dialogue within the various contexts. The biography of each educator was being progressively constructed over the course of life, through the transition of multiple learning identities. This study is an example of teachers who did not follow a linear life course; they preferred to change, to face challenges, to take risks and to live the profession as a succession of learning identities.

Keywords: Learning Identity, Biographical Knowledge, Biographycity, Adult Educators

RESUMO

Este artigo pretende refletir as formas pelas quais oito professoras do ensino primário construíram as suas identidades de aprendizagem em diferentes contextos da sua trajetória de vida profissional. Diferentes formas de aprendizagem sugerem que as educadoras enfrentaram transições difíceis ao longo das suas carreiras. A biografia de cada entrevistada foi um processo dinâmico em que cada uma delas usou todas as habilidades para construir a sua própria trajetória de vida. Essas educadoras não tinham identidades fixas. Em situação de transição biográfica, mudaram, tornam-se pessoas diferentes. Em cada situação nova, as suas identidades foram (re) construídas, atualizadas e modificadas. Em cada situação, novas experiências são vividas e integrados no processo de construção biográfica. Cada educadora utilizou o seu conhecimento, as suas motivações e experiências para construir a sua aprendizagem biográfica, através de um diálogo com os diversos contextos. A biografia de cada educadora foi sendo construída progressivamente ao longo da vida, através da transição de identidades múltiplas de aprendizagem. Este estudo é um exemplo de professoras que não seguiram uma trajetória de vida linear. Preferiram enfrentar desafios, assumir riscos e viver a profissão como uma sucessão de identidades de aprendizagem.

Palavras-chave: Identidades de Aprendizagem, Aprendizagem Biográfica, Biograficidade, Educadores de Adultos

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1. INTRODUCTION

This paper focuses on learning identity. We are interested in how identity and learning are transformed through workplace practices, as well as the methods that transform the work. We intend to understand how a group of eight teachers experience themselves as learners in different life spheres and the ways in which they constructed their learning identities in two different transitions. By transition we mean the movements and transfers from one setting to another that implicate changes in identity and agency, as people progress through the education system (Ecclestone, 2009).

Learning identity is a concept that could be defined in different ways. For example, we can reflect on this concept using the socio-pedagogical ideas of Paulo Freire. To the author, learning is a dynamic process in which the educator, interacting with others persons, uses all her/his skills to construct knowledge. People are not born with a destiny established a priori; there is always the possibility of each person defining their own life path. Every person, every educator, is an incomplete human being seeking to learn and improve throughout her/his life course (Freire, 1999).

In opposition to the sociological theory of fatalism, Vieira (1999) argues that the socio-cultural context in which a person was born will not determine cognitive, emotional or intellectual development. Social origin is just the initial context of the individual identity construction. Social mobility, upward or downward, may introduce significant variables in the personal existential experience.

Freire (1999) states that in facing a new situation a person will use previous experiences and knowledge to adapt to the new context. Alheit (1995), states that knowledge can only be truly transitional if it is biographical knowledge. According to Freire (1999), knowledge is to be built in the community through a dialogic relationship with other persons. He has also emphasized the critical role that learning, centred on the personal and professional experience of each educator, plays in developing a learning identity.

Recently, learning identity seems to be emerging as a new alternative to previous perspectives about the development of educators. Biography itself has become a field of learning (Alheit, 1995). Along the course of their lives, educators experience professional challenges and new situations that lead to new, increasingly complex functions. The challenges and transitions can transform the educator into an agent of a self-organized learning process whose result is a unique and unmistakable, although quite fragile, biography (Alheit and Dausien, 2007a). Alheit (1995), states that biographies are becoming more complicated at an individual level, as well as more colourful and autonomous.

According to Vieira (1999), the change, challenge and transition correspond to a transformation of learning identity that turns out to be a natural consequence of any biographical learning process. A transitional learning process deals with new information in a different way (Alheit, 1995). In this process the educator will divorce from routines, seeking new alternatives of work. Therefore, in this paper, biographical learning should be understood as changes and challenges that occurred along the life course of eight educators that we interviewed.

2. THEORETICAL FRAMEWORK

At the beginning of her/his professional life, each educator will build her/his learning identity through the experiences of living life. According to Dubar (1997), the construction of an identity involves a competition between two different processes: an autobiographical process and a relational process. The identity seems to be the result of various processes of

socialization including at an individual and collective level, a subjective and objective level and a biographical and structural level. The construction of identity is an unfinished process that changes continuously over time, in which the possibility of construction/deconstruction/reconstruction occurs. Vieira (1999) also states that identity is always in a constant process of construction/reconstruction. To the author, identity is constructed in a process of interaction between the individual and collective, where the individual goes through a biographical trajectory in a dialectic context of changes and challenges. This identity will be the result of a merger between the background of the person and the learning process. To Alheit (1995), a biographical background is an emergent potential for the modification of an individual self and for changing personal structures. Identity is not a product but a place of struggle and conflict, a construction space of ways of being in the teacher's profession (Nóvoa, 1995).

Alheit (2007) proposes to replace the concept of identity for the concept of biography. Theoretical and empirical studies have shown that issues of mutual concepts of identity and biography are no longer necessary. Identity is biographical identity. Both concepts are simultaneously established in the process of redesigning the experiences. Dausien (2007), states that persons have no fixed identities; each identity is (re)constructed, updated and modified. In new situations, each person lives new experiences that are integrated in processes of biographical (re)construction. The biographical constructions are not individual acts; they are the result from social activities and from processes of social interaction.

According to Alheit and Dausien (2007 b), the concept of identity is the meaning of the person's relationship with the world, and this relationship is a process of "life wide learning" (p.37). The contexts in which we live and the institutions where we work are generating biographies. The biographies are not hermetically sealed systems as they are formed on the "autopoiesis" civil society (Alheit, & Dausien, 2007 a). In this perspective a person is a living organization, contextualized in the environment, and an open system that has a structure of self-regulation. According to Couceiro (2002), people are "poietic" systems, which consist of self-organized persons able to build knowledge. This means that people are inserted into the ecological environment where lives interact, and they make commitments and have responsibilities, both as producers and products of the knowledge construction processes.

Regarding this idea of "autopoiesis", Freire (1987, 1999) states that knowledge is not transmitted; rather, knowledge is a life construction. Knowledge is an evolutionary process of the cognitive processes and it is up to the persons to process and manipulate the information acquired in the world around them. The idea of "autopoiesis" is associated with the concept of awareness (1999).

Biographical narratives are an "autopoietic" practice because people are producers of biographical knowledge (Couceiro, 2002). Without biography there can be no learning. Alheit and Dausien (2007a) state that learning identity is an "autopoietic" capacity of the person to organize his/her experiences in a reflexive manner. Even if learning identities are transient (Dausien, 2007), in biographical crises there are situations where knowledge fails in the ability to deal with new experiences and situations. Alheit (2007), states that in a professional life there is a potential for transformation that allows each person to begin again and again. This potential is our biographicity. The author uses this concept to analyse how the changes between different contexts can create new learning identities. Biographicity means that the educators can repeatedly redesign the contours of their lives within the specific contexts in which they had spent it, experiencing "these contexts as shapeable and designable" (Alheit, 1995, p.65).

To Kolb and Kolb (2010), a learning identity develops over time from a tentatively adopted learning stance toward life experience, to a more confident learning orientation, to a learning self that is specific to certain contexts. People with a learning identity see themselves as learners, seek and engage in life experiences with a learning attitude and believe in their

ability to learn. It requires the perspective of quiet reflection and a passionate commitment to action facing uncertainty. According to Field (2006), employability and mobility cause persons to be confronted with transitions in their personal and professional life course. In this mobility, people are in a constant state of adaptation and flexibility through which learning identity is an important resource in this process. In this context, learning is linked to a real biography. Without biography there is no learning; without learning there is no biography (Alheit and Dausien, 2007 b).

3. METHODOLOGY

This research was based on biographical methods. Eight primary school teachers were asked to tell, describe and narrate stories of their personal and/or professional life, giving us their versions of the experienced reality in a first-hand text (Poirier et al., 1999). According to Bogdan & Biklen (1994), this method is characterized by the attempt of re-constructing people's life courses, making relationships between a person's life experiences and events, interactions with other persons, collectives, or institutions. In the field of research in education, the increasing use of biographical methods has contributed to a better understanding of the teaching profession. Many authors advocated the use of this approach (Ferrarotti, 1988; Denzin, 1989; Dominicé, 1990; Nóvoa, 1995; Goodson, 1992; Riessman, 1993; Dubar, 1997; Atkinson, 1998; Kelchtermans, 1995; Clandinin and Connelly, 2000; Flick, 2005).

According to Clandinin and Connelly (2000), people are storytellers and, both collectively and individually, they are characters in their life stories. Flick (2005) states that a narrative interview enables the researcher to take a more comprehensive approach with the experiences of the interviewees. The biographical approaches are an appropriate method to study the lives of teachers because they tell their experiences, giving an account of the meaning that those stories had for themselves, in a narrative form (Kelchtermans, 1995). The narrative and life course go together, so the main attraction of the narrative as the method is its possibility to make life experiences relevant and meaningful (Guimarães, 2005). Each narrative is a reflection of how the life course has been understood and interpreted (Dominicé, 1998).

Bolivar (2002), states that a narrative is a particular form of reconstruction of experience, in a reflexive process, through which the persons gives us the meaning to what has happened in their individual life course. The episodes of life, experienced situations, plots, temporal sequences of events, people and interactions are constituent elements of the narrative (Clandinin and Connelly, 2000). To tell stories about a person's life is a way to assign it an identity (Bolivar, 2002).

In this paper we intend to reflect on the learning biography of a group of eight teachers, whose biographicity was subject to constant changes throughout their life course. The biographical interviews allowed us to know the biographic career of these teachers, determine their awareness about training processes, understand the construction of teachers' paths and identify the experiences and the most significant moments in their lives. According to Atkinson (1998), the interviewees remember and tell what they want the interviewer to know about them, which means that they can either voluntarily or involuntarily omit issues and events that might be relevant.

To help the individual report by triggering their memories, we used a document type file, with texts and images on topics to which the respondents were referring. This document served as a “simple reminder” (Poirier et al, 1999:13); it aimed to provide guidance and to allow the access to information that the respondent would not relate spontaneously. This document was organized according to different times in the personal and professional lives of the respondents: the period of life before the Primary teacher bachelor and the period

afterward, when the professional trajectory as primary school teachers had begun. All these interviewees made their entry into the profession through working in a primary school. A few years later they became engaged into adult education, going through a strong transition that would implicate ruptures with their usual paradigms of work and life. Some years later they had suffered a new, noticeable transition when their network of adult education ended, forcing them to go back to primary school and formal education.

The biographical interview was not used in order to reconstruct the history of the interviewees but to understand the contexts in which their biographies were constructed and what factors produced these changes. According to Flick (2005), this technique allows the generation of narrative texts about their biographic experiences. In turn, this allows us to identify the social structures that shaped these experiences. Riessman (1993) states that in the biographical interview there are six levels of representation of experience: making sense, counting, transcribing, analysing, reading and interpreting. However, for interviews to work, it is necessary for one who reads it to give a new meaning to the text, according to their own experiences and references.

4. LEARNING IDENTITIES

The interviewed teachers talked about their childhood, adolescence, school, first degree, the teacher's profession, being a primary school teacher and the mobility in the profession where the dimension of learning identity has been linked to their biographicity. During childhood and adolescence, before joining university, their lives were marked by school learning and informal activities. This life period of informal learning included family experiences and the experiences of social group life. It was characterized by three scenarios: learning acquired from family, learning acquired from school and a third scenario related to various social contexts, where each person learns to live together in a social group, learning to survive, to build knowledge and to develop human skills and social skills. *"My life was lived in school; at home and on the street (...) It was in the street where the playing and my friends were (...). In my house there was no television"* (E8).

According to those interviewed, several transitions occurred throughout childhood, adolescence and entry to university that were a natural consequence of their biographical learning. For all of them their first degree was a remarkable experience and a decisive moment in their lives. It was a turning point in the biographicity of these persons; it was the beginning of a new life cycle. It allowed them to gain a more autonomous life, less dependent on family, to make new friends, build new knowledge and acquire new life experiences. Most of the interviewees went to university after the revolutionary period of April 1974. Hence, their first degree was marked by the unique political moment occurring at that time. The abrupt changes of the revolutionary period caused a disruption of the values, norms and rules of a traditional Portuguese society. It provided learning that allowed a new conception of life. The revolution of April 1974 was decisive for the formation of a new profile of an elementary school teacher, who was supposed to be an agent of social transformation. To the teachers we interviewed, their first degree was equivalent to choosing a path. It was the beginning of a process of building knowledge and a learning process required to exercise professional life. It was, in summary, a transition to an entirely new reality.

"My class was of older people; I was younger (...) they were those warm years after the April 25; we had the MRPP, the UDP, COC, PCP-ML, that was a time when people brought everything to politics. I, at that time, was very naive, very constrained (...) So, that's when I started to grow, I had to grow. In that, the Magisterio was very important to me" (E6).

“The Magisterio has been spectacular. I loved it. These new disciplines, teachers who had come from abroad, they were people with other experiences, quite different from the teachers we had had in high school, the group work, debates, the RGA (s). It was all new to me. We were forced to learn. It was the best time of my student life.” (E3)

The transition to work triggered a new phase of intense learning. It was the phase of learning to teach from teaching. For most of the teachers interviewed, this period was marked by uncertainties and fears, where the school was the place to build professional knowledge. However, it also caused a “clash with reality” (Silva, 1997, p.54):

“What I have learned in the Magisterio has not served me anything, I knew nothing, I did not teach (...) students from 4 different years, in a room with 41 children, each one different. It was very tricky to reach the end of the year. I was desperate because I did not know what to do (...) but I learned a lot. If it was bad, then I could not have better experience. [A]nyone coming out of the Magisterio (...) had no idea what it was to work in those conditions” (E7).

However, not all of those interviewed felt the “reality clash” in the same way. Schools were very different; the support given to them by colleagues and the knowledge each one had of the school context were aspects that influenced their early careers. *“When I started working I did not have many difficulties (...) I was very supported by colleagues” (E5).* Most of the interviewed reported that they enjoyed the experience in primary school. After the initial difficulties, they had good moments in the profession. There were good memories and many stories to tell.

All of these eight teachers have been challenged by a new experience. They were invited to join the public network of adult education. During this period there was a major political investment in the area of public adult education. In this context, to be an adult educator was a complex challenge given the unpredictability and complexity of the situations to which they had to respond. Before joining this network, they had never heard about adult education. They accepted the invitation because they wanted to experience a new situation that was totally unknown. *“I accepted because I wanted to try something new within the profession” (E1).*

“It was a challenge, and I always liked challenges, and I was there (...) it was a job to start from scratch; I knew nothing about adult education. I did not know how it was done; I had to learn everything by myself (...) I learned; I learned with everyone” (E3).

“Joining adult education would demand of me a new way of being, because I would do different things and had not mastered basic skills. But we learn from life; we learn by doing, and I would have many opportunities to do it.” (E5)

By joining adult education all teachers have access to various training sessions, a key factor in the formation of each new adult educator. All the training sessions were very important to the learning identity of each adult educator.

“My first training session on adult education (...) was a great start (...) it has opened up educational horizons. It was a life lesson because the philosophy of Paulo Freire is not only educational, but it’s about life.” (E4).

Without exception all interviewees emphasized the importance of training as important learning moments, moments of knowledge construction and privileged spaces for sharing experiences. In these training sessions the adult educators were able to reflect on problems of

everyday work and had the possibility to build references to the adult education work they were developing. *"It was one of [the] richest experiences of my life; I had the possibility of making special learning (...) they were the best times of my life"* (E8). It was a new phase of learning identity. They learned about adult education in training sessions, in practice with the illiterate adults, in personal relationships with the people and in interaction with other colleagues. *"Adult education was as if we had a new course, following the Magisterio, and adult education was worth as much as another course"* (E7).

Among the teachers interviewed, one worked approximately twenty years in the public network of adult education. All others worked as adult educators for an average of five years. Despite the feeling of satisfaction reported about working in the public network of adult education, educational policies have changed; educators were forced to return to Primary School. It was another transition that led to new roles, new learning and more adequate training sessions for a new professional context: *"I felt the need to do training sessions. Adult education is one thing, [but] primary school is another educational context; they are different realities, and I needed to feel more up to date"* (E3). After their experiences in adult education, not all educators have returned to teach children. Some of them sought new challenges such as Special Education, teaching children with special educational needs, school management and project coordination. The experience in adult education gave them the opportunity to perform other educational activities. They had access to new spheres of learning biography. During this new biographical transition, all of them have invested in the profession, looking for professional development through specialized training.

"I took a course in Administration and school management (...) I was scholar sub-delegate, and this course had come to face what interested me (...). I learned many things I've come to use later (...) I went to school management. At first I was vice president; after, I was elected the chairman of the Group of Schools" (E7).

"In my life the need for training has been growing. It is the awareness to know more. I think it was a result of adult education. Because we have to perceive things, we must do our job well, and no one does a good job if [they do] not master the knowledge (...). Everything changes; we have to follow this change by changing our knowledge and our way of thinking." (E8).

It is significant to note that the social and political context, including the educational policies, and the status of the teaching profession were very important in the life trajectory of the interviewees who had the opportunity to engage in training and improve their economic and social conditions.

"Of all the training I had, what I liked most was Complementos de Formação in Adult Education. It was a breath of fresh air; I felt very well (...) I remember thinking, I am an illiterate; I do not understand any of this; I'm stuck in time (...) I had never heard those things. This training course was very important in terms of my growth as a teacher and as a person (...) I systematized what I had done in practice; I gave names to thoughts I had (...) with the theory that I learned, it was much clearer" (E4).

The investment in training was related to the course of their professional life. Learning was perceived as a personal investment in achieving security and stability in their careers.

5. DISCUSSION

With this study we observed that biographical learning depends on the contexts that marked the path of the life course of these educators. The biography of each interviewee was a dynamic process in which each used all their skills to build their own life's trajectory. In this study, there are very similar reports because some of them have similar ages, similar life trajectories, shared experiences with each other and experienced the same social, political and historical moments. By analysing the narratives we can realize that each person used their knowledge, motivations and experiences to build her/his biographical learning in a dialogue within the various contexts. The biography of each educator was being constructed progressively over the course of life, through the transition from multiple learning identities. The biographical transitions were triggered by several exogenous factors (education, policy) and endogenous factors (job mobility, family life, life project, and training). These transitions promoted the building of multiple learning identities in their life course. These educators had no fixed identities; they changed and become different persons. In each new situation their identities are (re) built, updated and modified. In each situation new experiences are gained, which are integrated by the subjects in the process of biographical (re) construction (Dausien, 2007). In this study the learning experienced by this group of educators was very important in order to perform new functions and to adapt to new professional situations. Each person had to build new knowledge from the beginning of her/his career and has been diversifying the knowledge and professional skills throughout their course of life. All of them had the opportunity to organize their biographies, making personal and professional choices.

This study also identified the importance that these educators gave to the formation and the meaning of their investment. The spheres of the professional life provided the biographical learning that allowed them to make transitions to new educational roles, with a new set of activities and responsibilities. In the biographical transitions, they have created new social relations with different persons, created new friendships, constructed new concepts and expanded the possibilities of understanding and interpreting life. The professional life course of these teachers will be the intersection between their life history and the biographical learning carried out in various social, historical and cultural contexts.

This study is an example of teachers who did not follow a linear life course; they preferred to change, to face challenges, to take risks and to live the profession as a succession of learning identities. These eight teachers have developed several identities because the profession of a primary school teacher allowed a choice of different career paths in the educational field. To become an adult educator, teach children with special educational needs or embrace educational management was not the result of a choice made at the beginning of a career; rather, it was the result of opportunities that have happened in the context of the profession. The biographical method used in this study served as a context for the production of meanings about personal and professional situations historically experienced. All of them have valued the process of the construction of learning identities as central to their professional performance.

Through the biographical narrative it was possible to determine how a group of educators have interpreted their biographicity. The more we are able to find out why we are who we are, the better the chances we have to understand why reality is as it is (Freire, 1987).

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PARENTING ALLIANCE AMONG MOTHERS OF PSYCHOSOCIALLY AT-RISK FAMILIES

ALIANÇA PARENTAL EM MÃES DE FAMÍLIAS EM RISCO PSICOSSOCIAL

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ABSTRACT

Parenting alliance is the degree of commitment and cooperation present between a mother and father in raising their child, and its lack has been linked to inadequate parenting practices and subsequent negative developmental outcomes for the child. Supportive coparenting after relationship dissolution is associated with increased paternal involvement. At-risk families are much more likely to experience relationship dissolutions; therefore, it is especially important to study parenting alliance in such families. This study analyzes the parenting alliance of 80 mothers of families at psychosocial risk with their children's father, and its relationship with several socio-economic, family, couple and child-related variables using the Parenting Alliance Inventory and a socio-demographic questionnaire. The results showed lower parenting alliance scores in at-risk mothers than those reported in community samples and a negative association between parenting alliance and number of children. Moreover, mothers of one-parent, unstable, separated or divorced families showed significantly lower levels of parenting alliance than their counterparts. These findings highlight the need to include the strengthening of parenting alliance as the primary aim of psycho-educational interventions in at-risk families, especially in the many families in which the parents are no longer a couple.

Keywords: Parenting Alliance, Coparenting, At-risk Families, Psychosocial risk.

RESUMO

A aliança parental avalia o grau de compromisso e de cooperação entre os pais na educação dos seus filhos e a sua ausência tem sido associada a práticas parentais inadequadas e a consequências negativas no desenvolvimento infantil. Uma aliança parental sólida após a separação conjugal está associada a um maior envolvimento do pai na educação da criança. As famílias em risco têm uma maior probabilidade de viver separações conjugais, pelo que é especialmente importante estudar esta variável neste grupo. Neste estudo analisámos os níveis de aliança parental de 80 mães de famílias em risco psicossocial com o pai dos seus filhos e a sua associação a diferentes variáveis socioeconómicas, familiares, do casal e do menor. Utilizámos o *Parental Alliance Inventory* e um questionário de dados sociodemográficos. Observaram-se níveis de aliança parental inferiores aos de amostras comunitárias e uma associação negativa entre a aliança parental e o número de filhos. As mães de famílias monoparentais, instáveis, separadas ou divorciadas apresentaram uma aliança parental significativamente inferior. Estes resultados apontam para a necessidade de incluir o reforço da aliança parental como objetivo nas intervenções psico-educativas com famílias em risco, especialmente em famílias numerosas e quando ambos progenitores já não são um casal.

Palavras-Chave: Aliança Parental, Coparentalidade, Famílias em Risco, Risco Psicossocial.

JEL Classification: I30

1. INTRODUCTION

Appropriate parenting requires both parents to coordinate their parenting objectives, styles and strategies to convey coherent expectations and values to their children (Grych, 2002). Parents' ability to communicate, cooperate and manage conflicts plays a crucial role in effective parenting. Although marital and coparenting relations are closely intertwined, these concepts are not synonymous because the coparenting system involves a third element that affects the nature of parents' interactions – the child (Grych, 2002).

These emotional and evaluative aspects of marital support have been referred to as parenting alliance (Floyd & Zmich, 1991; Weissman & Cohen, 1985). Abidin and Brunner (1995) define parenting alliance as the extent to which parents appreciate, respect and value the parenting and opinions of their spouses. Parenting alliance encompasses the interpersonal components of the parenting role, such as coordination, help and mutual trust between a man and a woman as parents. The parenting alliance is established when each parent invests in the child, values the other parent's involvement, respects his or her judgment and desires to communicate with him or her about child-related matters (Weissman & Cohen, 1985). Therefore, parenting alliance is the degree of commitment and cooperation present between the mother and the father in raising a child and is an aspect of marriage distinct from its romantic and sexual dimensions (Abidin & Brunner, 1995).

Considering the significant number of divorced parents and blended families, assessing parenting alliance is useful because it measures men and women's success as parents, not as a couple. Weissman and Cohen (1985) suggested that if a solid parenting alliance exists, parents could continue to raise their children adequately after a divorce or during a conflictive marriage. Therefore, an adequate assessment of parenting alliance is important because it indicates parents' ability to cooperate with each other to meet their child's needs (Abidin & Brunner, 1995). Floyd, Gilliom and Costigan's (1998) study supports the empirical distinction between marital quality and parenting alliance. In their study, parenting alliance mediated the effects of marital quality on parenting experiences (such as perceived parenting competence and negative parent-child interactions). These results also suggest that marital functioning influences parenting practices through parenting alliance.

Several studies have noted the influence of parenting alliance on a couple's marriage. For instance, one of the predictors of change in marital satisfaction is mutual support in parenting-related tasks. Belsky and Hsieh (1998) investigated the role of personality, task division and coparenting in marital satisfaction, especially the role that these factors played in differentiating couples whose marital satisfaction decreased from those who stayed satisfied. The proportion of non-supportive coparenting (e.g., a parent comforting a child after the other parent had punished him/her) was the only factor that distinguished these two groups. Furthermore, Block, Block and Morrison (1981) found that parental divergences in child educational practices were linked to subsequent marital separation, externalized behavior problems in boys and internalized behavior problems in girls.

Frequent marital conflict may be associated with inadequate parenting and negative developmental outcomes for the child because these conflicts diminish the availability of parental support, an important resource in child-rearing (Wilson & Gottman, 2002). For example, Finger, Hans, Bernstein and Cox (2009) observed that conflictive marital relationships were associated with problematic maternal behavior, lower maternal sensitivity and an insecure and disorganized mother-child attachment. However, in the case of two-parent families, the associations between marital conflict and child attachment were buffered by the family structure. In addition, Frosch, Mangelsdorf and McHale (1998) found that hostility between parents during family play at 6 months postpartum predicted a less secure mother-child attachment and that marital conflict three years postpartum was associated

with a less secure parent-child bond. Similarly, Belsky and Volling (1987) observed that high levels of positive behavior between parents (such as sharing leisure moments, showing affection and exchanging mutual compliments) were significantly associated with positive and responsive parental behaviors.

This “spill-over effect”—the continuity between the affective tone of the marital dyad and the parents-child triad—was also found by Kitzmann (2000). In her study, negativity in the marital dyad was associated with less democratic coparenting. This negativity was also associated with parents’ behavior, specifically to more negative and less affectionate and supportive parents-child interactions. However, this process may differ by gender. Belsky, Youngblade, Rovine and Olling (1991) found stronger negative associations between marital relationship deterioration and positive parenting among men. When the quality of the marriage was diminishing, men tended to engage in more negative and intrusive behaviors towards their three-year-old child, and the child was more disobedient to his/her father. Among women, however, the results indicated the existence of a compensatory process in their relationship with their children (i.e., when the marital relationship deteriorated they tended to invest more in the child).

Because supportive coparenting after relationship dissolution is associated with increased paternal involvement (which buffers the negative effects of parental relationship dissolution) and because low-income, at-risk families are more likely to experience relationship dissolution, supportive coparenting after separation is particularly important in these families. The results from several studies have shown that parenting alliance influences parents’ behavior toward children who are biologically and psychosocially at-risk (Floyd & Zmich, 1991; Rodrigo, Martín, Máiquez, & Rodríguez, 2007). Parenting alliance also influences fathers’ involvement in child-raising and education-related activities (McBride & Rane, 1998). To study psychosocially at-risk families, Jones, Forehand, Dorsey, Foster and Brody (2005) examined the effects of coparent support and conflict on mother and child adjustment in 248 low-income, African American, single-mother-headed families and found that coparent conflict was a more robust predictor of mother and child maladjustment than coparent support. Specifically, coparent relationships characterized by high levels of support and low levels of conflict were associated with the highest levels of parental monitoring behavior, whereas coparent relationships characterized by low levels of support and high levels of conflict were associated with the lowest levels of monitoring. Dorsey, Forehand, and Brody (2007), examined the relationship between conflict between the mother and the primary co-caregiver and parenting practices in single-parent, economically disadvantaged African American families. The authors observed that conflict with a co-caregiver was significantly related to parenting, both directly and indirectly through maternal psychological distress. The Fragile Families and Child Wellbeing Study was a longitudinal examination of whether relationship characteristics (commitment and quality) and child characteristics (i.e., difficult temperament and gender) predicted initial levels of and change in supportive coparenting after relationship dissolution (Kamp Dush, Kotila, & Schoppe-Sullivan, 2011). The authors found that, overall, supportive coparenting decreased over time, and mothers who reported that their child was more difficult had significantly lower initial levels of supportive coparenting. These results suggest that parents’ relationship characteristics are important predictors of supportive coparenting, both initially and over time.

Although the importance of parenting alliance is demonstrated by its association with parenting behaviors and subsequent child development outcomes, it appears that this dimension has not yet been studied in at-risk Portuguese families. Therefore, the aims of this study are:

1. To analyze the socio-demographic profile of families with at-risk minors from the Algarve;

2. To study the association between parenting alliance and couple, family, minor and socio-educational-work-related variables (see Table 1);
3. To determine whether there are significant differences in parenting alliance scores according to couple, family, minor and socio-educational-work-related variables (see Table 1).

Table 1. Classification of the socio-demographic variables

Variables			
Couple	Family	Minor	Socio-educational-work
Length of relationship with spouse	Type of family	Age	Educational level
Marital status	Family stability	Gender	Family income
Who performs parental role	Number of children		Work situation
	Number of minors living in the household		
	Number of people living in the household		

2. METHOD

Participants

The participants included 80 Portuguese mothers from the Algarve who were parenting at least one psychosocially at-risk minor. The sample selection criteria required participants 1) To have at least one minor in the household and 2) To be experiencing several problems and risk situations (such as work problems or financial strain) that, although a risk for the children, were not severe enough to remove the child from the family of origin. The professionals (social workers and psychologists) at the institutions in which the minors were enrolled identified mothers who met the inclusion criteria and invited them to participate in the study.

Participants were 39.14 years old on average ($SD = 9.48$, Range = 19-70). Most of the mothers had a low educational level (61.25% had not attended school or had not completed elementary school). Most of the families were stable (87.5%), i.e., without recent changes in their composition, and two-parent (75%). The majority of participants were married or in a *de facto* union (77.5%) (Tables 2 and 3).

Measures

- Socio-demographic data questionnaire (Nunes, Lemos, Ayala Nunes, & Costa, 2013). This questionnaire gathers socio-demographic, family, educational, financial and work-related information.
- Parenting Alliance Inventory (PAI; Abidin & Brunner, 1995). This 20-item instrument assesses parenting alliance, defined as the extent to which one parent believes that he/she has a good, supportive, trusting and functional relationship with the other parent. Each of the PAI items asks the parent to respond on a 5-point Likert scale ranging from 1 (*Strongly Agree*) to 5 (*Strongly Disagree*). The instrument is applicable regardless of the parents' current marital status and the parental figure's biological relationship to the child. The Cronbach's alpha of this sample ($\alpha = .97$) was identical to the one reported by the authors of the instrument.

Procedure

Institutions that serve at-risk minors (e.g., *Comissão de Protecção de Crianças e Jovens*, *Cruz Vermelha Portuguesa*, *Associação Uma Porta Amiga*, *Programa de Erradicação do Trabalho Infantil*) were contacted and asked to collaborate in this study. All of the institutions contacted agreed to participate. After establishing a collaboration protocol with these institutions, mothers who met the inclusion criteria were asked to participate by the professionals assigned to their cases. The mothers who agreed to participate signed an informed consent form stating that they could terminate their participation at any moment without negative consequences for them or their children. Data anonymity and confidentiality were guaranteed.

The instruments were administered in an individual interview by a trained interviewer, and participants took approximately 20 minutes to complete both questionnaires. Three of the participants reported not having any contact with the biological father of their children; therefore, they did not complete the PAI. Half of the interviews took place in the institutions' facilities and the other half took place in the participants' homes.

Statistical analysis

For the descriptive statistics, the percentage distribution of the qualitative variables and the mean, standard deviation and range of the quantitative variables are presented. The correlations were analyzed using Pearson's r coefficient. The statistical assumptions for parametric analysis could not be met (Tabachnick & Fidell, 2007) because of the small group size. However, non-parametric tests (*Mann-Whitney* and *Kruskal-Wallis* tests) were used to perform inter-group comparisons. When significant differences between the groups were observed, Pearson's r coefficient was used in the *Mann-Whitney* test to determine the effect size. Mean multiple comparison was used in the *Kruskal-Wallis* test to identify groups that differed significantly from each other. The statistical analyses were performed using PASW® v-18 (Predictive Analytics Software).

3. RESULTS

Socio-demographic data

As Table 2 shows, most of the participants had precarious job situation,s in addition to a low education level: 60% were unemployed, and of those who had a job, 75% were low-qualified. Half of the participants were receiving a form of welfare aid to supplement the income obtained from their own or their spouse's job. Furthermore, 72.34% of participants lived below the national poverty line.

Table 2. Socio-demographic data

	n	%
Education level		
No education/Elementary school incomplete	49	61.25
Elementary school	21	26.25
High school	8	10.00
University	2	2.50
Family stability		
Stable	70	88.61
Unstable	9	11.39
Type of family		
One-parent	13	16.25
Two-parent	36	45.00
Extended	21	26.25
Blended	10	12.50
Job situation		
Employed	32	40.00
Unemployed	48	60.00
Job qualification		
Low	24	75.00
Medium	6	18.75
High	2	6.25
Source of income		
Work	36	45.00
Work and social welfare	40	50.00
Social welfare	4	5.00
Poverty¹		
Poor	34	72.34
Non-poor	13	27.66

¹ Information about participants' family income was only available for 47 subjects.

Parenting alliance and socio-demographic characteristics

Parenting alliance showed a significant negative association only with the number of children variable ($r = -.27$; $p = .016$); mothers who had more children reported lower parenting alliance scores. Noticeably, parenting alliance was associated neither with the number of years the participant had been in a relationship with her spouse ($r = .06$; $p = .662$) nor with the number of children living in the household ($r = .217$, $p = .058$). The range of the parenting alliance scores was high, with a minimum of 20 points and a maximum of 100 points ($SD = 22.90$). The mean score was 72.08 points.

Table 3. Correlation matrix between parenting alliance and socio-demographic dimensions

	1	2	3	4	5	6	7	8
1. Parenting alliance	-	.058	-.158	-.124	-.273*	.207	.217	.036
2. Years of relationship		-	.522***	.383**	.059	.203	-.163	.046
3. Participants' age			-	.496***	.236*	.086	-.270* .270*	.201
4. Minors' age				-	.146	-.061	-.340**	.352*
5. Number of children					-	.324**	.327**	-.150
6. People in the household						-	.592***	-.214
7. Minors in the household							-	-.171
8. Family income								-
M	72.08	16.77	39.14	13.46	2.85	4.69	2.03	838.62
SD	22.90	11.94	9.48	4.12	1.68	1.59	1.11	462.59
Range	20-100	1-49	19-70	1-19	1-10	2-10	0-5	200-2200

* $p \leq 0,05$ ** $p \leq 0,01$ *** $p \leq 0,001$

We assessed whether the following factors yielded significant differences in PAI scores: family type (one-parent/two-parent, nuclear one-parent/nuclear two-parent, extended or blended), stability (stable, unstable), minor's gender, work situation (employed, unemployed), poverty situation (poor, non-poor), education level (did not attend school or did not complete elementary school, elementary school, high school, university), marital status (married/de facto union, separated/divorced or single) and parental figure (whether the person who fulfilled the father role was the biological father and the participant's spouse, only the child's biological father or only the participants' spouse) (Tables 3 and 4).

Table 3. Comparison of means and standard deviations of Parenting Alliance scores according to family type, family stability, minors' gender, work situation and poverty situation (Mann-Whitney test)

Parenting Alliance	Groups		<i>U</i>	<i>p</i>
	One-parent (N = 20)	Two-parent (N = 60)		
	51.88 (23.19)	77.80 (18.60)	216.50	.000
	Stable family (N = 70)	Unstable family (N = 9)		
	73.96 (21.22)	55.00 (26.32)	170.50	.035
	Boy (N = 53)	Girl (N = 27)		
	73.31 (22.37)	69.65 (23.52)	609.50	.564
	Employed (N = 32)	Unemployed (N = 48)		
	72.45 (22.05)	72.30 (23.19)	676.50	.766
	Poor (N = 32)	Non-poor (N = 12)		
	72.66 (21.71)	67.75 (20.84)	161.00	.414

The results showed significant differences in Parenting Alliance scores according to family type ($U = 216.50$; $z = -3.61$; $p = .000$; $r = -.41$), which had a moderate effect size. Mothers from two-parent families showed higher Parenting Alliance scores than their counterparts from one-parent families. There were also significant differences in Parenting Alliance scores between stable and unstable families ($U = 170.50$; $z = -2.11$; $p = .04$; $r = -.24$); mothers of unstable families showed lower levels of Parenting Alliance, though the effect size was small (Table 3). No differences in Parenting Alliance scores were caused by minor's gender, mothers' work status or poverty status.

Table 4. Comparison of means and standard deviations of Parenting Alliance scores according to family type, marital status, parenting figure and education level (Kruskal-Wallis test)

Parenting Alliance	Groups				<i>H</i>	<i>P</i>
	Nuclear one-parent (N = 13)	Nuclear two-parent (N = 36)	Extended (N = 21)	Blended (N = 10)		
	47.55 (17.68)	77.44 (18.10)	73.25 (26.66)	77.40 (21.51)	13.94	.003
		Married/De facto union (N = 62)	Separated/Div. (N = 13)	Single (N = 3)		
		76.07 (20.20)	58.82 (20.97)	46.67 (46.18)	8.84	.012
		Father and spouse (N = 46)	Only father (N = 22)	Only spouse (N = 9)		
		79.26 (18.04)	53.27 (21.76)	81.33 (14.64)	17.38	.000
	Elementary school inc. (N = 47)	Elementary school (N = 21)	High school (N = 7)	University (N = 2)		
	70.00 (24.82)	76.24 (20.30)	79.86 (13.27)	50.00 (15.56)	2.95	.400

To further explore the differences in Parenting Alliance among family types, we developed a more detailed classification of the participants' families, dividing them into four categories: nuclear one-parent, nuclear two-parent, extended and blended. As shown in Table 4, significant differences were also found in Parenting Alliance scores when this classification was applied ($\chi^2_{KW}(3) = 13.94; p = .003; N = 77$). A multiple comparisons of mean ranks test was performed. The results showed that mothers of one-parent nuclear families had significantly lower PAI scores than those from nuclear two-parent ($p = .000$), extended ($p = .001$) and blended ($p = .003$) families. However, no differences were found among the latter three types of families.

Marital status also yielded significant differences in the mean PAI scores ($\chi^2_{KW}(2) = 8.84; p = .012; N = 77$). According to the multiple comparisons of mean ranks test, participants who were married or in a *de facto* union showed significantly higher levels of PAI than separated/divorced participants and single mothers (Table 4). However, no significant differences were observed between separated/divorces mothers and single mothers ($p = .193$), possibly due to the small size of the single mothers group ($N = 3$).

As shown in Table 4, there are significant differences between the parental figure PAI scores ($\chi^2_{KW}(2) = 17.38; p = .000; N = 77$). A multiple comparisons of mean ranks test revealed that when the father of the participant's child was not her spouse, PAI scores were significantly lower than when the father of the child was also the participant's spouse ($p = .000$) or when the spouse was not the biological father of the child ($p = .003$).

4. DISCUSSION

The first aim of the study was to analyze the socio-demographic profile of families with at-risk minors from the Algarve. The results showed that this is an especially vulnerable group because such families live in precarious economic, employment and educational conditions. These factors may hinder access to social rights that guarantee full participation in society (Raya, 2004). The high rates of unemployment, low-qualified jobs, poverty and low education levels among this population constitute serious risk factors that jeopardize the development and wellbeing of children growing up in these families and demands attention from political decision-makers and civil society.

Our strengths-focused approach considers more than the risk factors that these families face. In fact, some of their characteristics may act as protective factors that can, to some extent, buffer the effects of the risk factors mentioned above. For example, a significant percentage of these families are intact; most of them are two-parent and stable. In addition, only a small portion of the participants depends exclusively on social welfare as a source of income. Although these families may have some characteristics or resources that mitigate the negative effects of the risk factors they face, it must be emphasized that this population is vulnerable and has a critical need for economic and emotional support (Menéndez, Hidalgo, Jiménez, Lorence, & Sánchez, 2010; Nunes et al., 2011).

The parenting alliance levels reported by the participants were lower than those observed by Abidin and Brunner (1995) in a community sample and slightly lower than those found by Hidalgo, Menéndez, Sánchez, Lorence, and Jiménez (2009) and Menéndez and colleagues (2010) in a psychosocial risk sample. Hidalgo and colleagues (2009) compared parenting alliance among at-risk mothers to that among community mothers and found that the former group showed lower parenting alliance scores.

Therefore, the results suggest that participants in our study do not receive adequate support from their spouses in child-rearing and parenting-related tasks. However, these results should be interpreted with caution because the PAI has not yet been validated in a Portuguese population or an at-risk population.

Nevertheless, the finding that marital relationships tend to be less satisfactory and less supportive in disadvantaged populations has been found previously (Magnuson & Duncan, 2002). Some authors have posited that economic pressure may hinder couples' relationships and coparenting, making it harder for these parents to raise their children together (Brody et al., 1994; Simons, Lorenz, Wu, & Conger, 1993). This may contribute to participants' low parenting alliance levels. A more detailed investigation should be conducted to determine which factors predict parenting alliance in at-risk parents. Such an investigation should include fathers' perspectives about marital quality and parenting alliance because it would be useful to compare fathers' and mothers' perspectives.

Parenting alliance was inversely associated with number of children. This finding is consistent with the results of Twenge, Campbell and Foster (2003), which indicated a negative association between marital satisfaction and number of children. Several studies have found that marital satisfaction diminishes after the birth of children (Belsky, Lang, & Rovine, 1985; Cowan et al., 1985; Ruble, Fleming, Hackel, & Stangor, 1988). There are many reasons for this decline. First, children introduce additional stress into a couple's relationship. The birth of a baby may cause role-related conflicts and restrict individual freedom (Karney & Bradbury, 1995; Lavee, Sharlin, & Katz, 1996).

Second, the responsibilities of parenting can interfere with marital intimacy because the number of tasks and pressures increase after the birth of a child (Anderson, Russell, & Schumm, 1983; McHale, 1995). These responsibilities have negative consequences on couples' companionship and sex life (White, 1983). According to Frank, Hole, Jacobson, Justkowski and Huyck (1986) and O'Brien and Peyton (2002), parenting alliance-related measures are closely associated with those of marital intimacy, which has a tendency to diminish during the first three years following a child's birth, regardless of whether that child is the couple's first (O'Brien & Peyton, 2002).

Therefore, it is possible that as the number of children in the family increases and the parents begin to experience the additional responsibilities and tasks that accompany the presence of more children, fathers begin to neglect their parenting and mothers feel less satisfied with the support they receive, believing that it does not sufficiently help them cope with the stress of raising many children. However, to confirm this hypothesis, other couple-related variables must be included, such as satisfaction and marital intimacy. Additionally, a longitudinal study that assessed which variables explained change or stability of parenting alliance over time would be useful.

The authors of the PAI (Abidin & Brunner, 1995) also failed to observe an association between parenting alliance, child's age, parents' age, parental education level and family income. The observation that participants who were married or in a de facto union and were members of two-parent, stable families in which their spouse was their child's biological father had higher levels of parenting alliance than their counterparts is unsurprising. Among one-parent families, single mothers were those who reported lower parenting alliance scores. Abidin and Brunner (1995) found similar results in a community sample. These authors also found significant differences in parenting alliance scores among married, divorced and single women; married women showed the highest levels of parenting alliance. However, in their study, divorced women reported lower scores than single women. It is likely that parenting alliance varies according to the degree to which the couple relationship remains intact (Abidin & Brunner, 1995). This result highlights the interdependence of marital quality and parenting alliance: it appears to be more difficult to raise a child when the emotional bonds between the spouses are broken. Conflicts in the marital relationship can easily spill over into the coparenting system.

Several studies have noted a more intense association between marital quality and parent-child interaction among men than among women. When marriages deteriorate, men tend to

display more negative behaviors in their parent-child interactions or to emotionally withdraw from their children (Belsky et al., 1991; Krishnakumar & Buehler, 2000; Margolin, Gordis, & John, 2001). The findings of these studies suggest that when the marital relationship ends, fathers tend to participate less in their children's upbringing. This may explain why divorced mothers feel that the fathers of their children do not perform their parenting roles in a satisfactory manner.

However, the conflicts that lead parents to separate can interfere with their ability to cooperate amicably in raising their children. When they separate, mothers and fathers may develop divergent educational styles, practices, beliefs and values, which undermine parenting alliance.

5. CONCLUSIONS

The parenting alliance levels of mothers of psychosocially at-risk families from the Algarve are lower than those reported by other authors who studied at-risk samples, including separated women living in unstable families with more children. Because parental conflict and lack of cooperation compromise a couple's ability to be effective parents (Bradford & Barber, 2007; Krishnakumar & Buehler, 2000), this factor should be taken into account when planning interventions with this population.

This study had several limitations. First, its geographical specificity did not allow us to generalize the results to other Portuguese at-risk populations. Additionally, the lack of a study validating the PAI for the Portuguese population made it difficult to compare participants' scores with those from community samples. Hence, the validation of the PAI for the Portuguese population is warranted. The study's reliance on self-descriptive measures is another limitation that should be compensated for in the future by using other methods and sources of information. In spite of these limitations, we believe that no previous published work has explored parenting alliance in Portuguese at-risk families. Therefore, this study is a contribution to the research in this area.

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INSTITUTIONAL THEORY IN TOURISM STUDIES: EVIDENCE AND FUTURE DIRECTIONS

A TEORIA INSTITUCIONAL NOS ESTUDOS TURÍSTICOS: EVIDÊNCIAS E DIREÇÕES FUTURAS

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ABSTRACT

The present article focuses on the effective application of the Institutional Theory as a theoretical perspective in scientific studies. The particular goal is to present a literature review about the Institutional Theory applied to the tourism industry, particularly the wine tourism segment. Different research areas are identified among those developed within institutional premises in tourism studies. The present review discusses the influence of the institutional framework in the organizational behavior and the pursuit of social legitimacy of tourism organizations. The Institutional Theory presents itself as a consolidated theoretical perspective used to explain organizational behaviors; however, it has been poorly used in tourism studies. It is in this sense that this article offers significant contributions by gathering a theoretical discussion body of the Institutional Theory in the tourism industry, which could lead to practical implications concerning the public and private management of this sector. This article provides theoretical reflections for future research directions with the Institutional Theory in wine tourism and adds to the few tourism studies developed with an institutional perspective.

Keywords: Institutional Theory, Tourism, Wine Tourism, Tourism Organizations.

RESUMO

Este artigo tem foco na aplicação da Teoria Institucional como uma perspectiva teórica em estudos científicos. Particularmente tem o objetivo de apresentar uma revisão da literatura sobre a Teoria Institucional aplicada no sector do Turismo e, dentro deste, no segmento do Enoturismo. Identificam-se as diferentes áreas de investigação desenvolvidas com os pressupostos institucionais nos estudos turísticos. Discute-se a influência do contexto institucional no comportamento organizacional e a busca pela legitimidade social das organizações turísticas. A Teoria Institucional apresenta-se como uma perspectiva teórica consolidada e utilizada para explicar comportamentos organizacionais. Porém, ainda é pouco utilizada nos estudos turísticos. É nesse sentido que este artigo oferece importantes contribuições ao organizar um corpo teórico de discussão da Teoria Institucional no sector do Turismo, o que pode gerar implicações práticas para a gestão pública e privada deste sector. Este artigo fornece reflexões teóricas para direções futuras de investigação com a Teoria Institucional no Enoturismo e soma-se aos poucos estudos turísticos desenvolvidos com a perspectiva institucional.

Palavras-chave: Teoria Institucional, Turismo, Enoturismo, Organizações Turísticas.

JEL Classification: M10, M20, M21

1. INTRODUCTION

The Institutional Theory is a theory of organizations that was developed by Philip Selznick around 1940. The initial goal of the Institutional Theory was to explain the group conflicts and the rational limitations inherent to the organization's decision-making process, coming from pressure groups and from alliances. Over time, however, the theory advanced by beginning to attribute importance to conflicts of interests that were either internal to the organization or between organizations. By also considering the organization's responses to these conflicts, it investigated the relation between internal stability, involvement with the organizational field and the search for social legitimacy.

This origin of the Institutional Theory reveals an embodied, multidisciplinary characteristic throughout its theoretical evolution, provided by influences from the fields of the Political Sciences, Economics and Sociology.

Today, it is a consolidated theory with application in different scientific areas focusing its analysis at an institutional level. In other words, the primary focus is on the organization's relation with its environment and the rules within this environment that imposes restrictions on the organization's behavior.

The Institutional Theory is, therefore, the focus of analysis of this study. However, the present work does not have the pretension of doing an exhaustive literature review about the Institutional Theory. Rather, it consists of presenting the works carried out with an institutional perspective in the tourism sector and, in particular, the wine tourism¹ sector.

The interest in these particular sectors of the economy or areas of application of the theory arise within the study of the Doctoral Theses in Tourism which has a fundamental goal of understanding the development of wine tourism in organizational contexts. With an institutional perspective, it intends to comprehend the way in which the institutional organism "Wine Route" influences the development of wine tourism in wineries. Such an approach commits this work to becoming an initial part of a theoretical deepening in comprehension that permits the understanding of organizations² in its own environment.

The present work begins with the presentation of the theoretical foundations of the Institutional Theory. The concepts of institution, organizational field, isomorphism and social legitimacy are discussed. The next topic presents a review of the literature of the Institutional Theory in Tourism, identifying the different research areas where the institutional assumptions are applied in these tourism studies. The present review discusses the influence of the institutional framework in the organizational behavior and the pursuit of social legitimacy of tourism organizations.

The selection criteria of this review mainly prioritized seminal articles with an impact factor in scientific journals. The study of the Doctoral Theses in Tourism is also identified, where the Institutional Theory is applied as a theoretical basis.

Among the tourism studies presented, a detailed look at the application of the Institutional Theory in wine tourism is proposed. Therefore, areas for future studies to investigate are identified, related to issues of wine tourism and this theoretical perspective.

Finally, the conclusion identifies gaps in scientific knowledge about wine tourism, to which the Institutional Theory has the ability to respond, and it highlights the main contributions of this work.

¹ Wine tourism is a segment of the tourism activity and a scientific investigation line in the tourism area. It arises from the combination of the wine product with the tourism activity, and it consists of providing experiences and knowledge about the elaboration technique and wine production where the main activities are visiting the caves and wine tasting.

² In this study the terms "organization" and "company" are used as synonymous.

2. INSTITUTIONAL THEORY: CONCEPTS AND FUNDAMENTAL ASSUMPTIONS

According to the Institutional Theory, organizations are involved in an institutional environment characterized by the existence of different institutions guiding the organization's behavior.

For the Institutional Theory, there is a conceptual differentiation between "institution" and "organization" and a mutually interdependent relation between them. Institutions are defined as *"the rules of the game or humanly-devised structures that provide incentives and constraints to economic actors"* (North, 1990: 3). An institution reflects a space of human conduct reproduced by social rules being developed in and through history (Scott and Christensen, 1995). Thus, it establishes boundaries which shape interactions between people, organizations and social actors.

In its turn, organizations integrate institutions in the sense that they provide a structure to develop such human interactions. How an organization comes into existence and how it evolves are both fundamentally influenced by a specific institutional framework (North, 1990).

According to Richard Scott, an institution consists of three elements or institutional pillars: regulative, normative and cognitive (Scott, 1995) (Table 1). The regulative pillar provides explicit guidance to organizations by means of formal rules. The normative pillar is constituted of values and social standards that establish informal rules for organizational behavior. The cognitive pillar refers to cultural elements (social rules and abstract meanings) governing organizational behavior.

These three elements of the institution each differently affect the organization's behavior as well as provide stability and meaning to social behavior.

Table 1: Three elements of the institutions

	Regulative	Normative	Cognitive
Basis of compliance	Expedience	Social obligation	Taken-for-grantedness, shared understanding
Basis of order	Regulative rules	Blinding expectations	Constitutive schema
Mechanisms	Coercive	Normative	Mimetic
Logic	Instrumentality	Appropriateness	Orthodoxy
Indicators	Rules, laws, sanctions	Certification, accreditation	Common beliefs, shared logics of action, isomorphism
Basis of legitimacy	Legally sanctioned	Morally governed	Comprehensible, recognizable, culturally supported

Source: Scott (1995: 35)

Another concept inherent to the Institutional Theory is the "organizational field" concept. This allows operationalizing the institutional environment involving the organizations and explains the homogeneity of organizations. DiMaggio and Powell (1983: 148) define it as *"those organizations that, in the aggregate, constitute a recognized area of institutional life: key suppliers, resource and product consumers, regulatory agencies, and other organizations that produce similar services or products."*

Therefore, an organizational field is institutionally defined and formed by the group of organizations that somehow relate and influence each other. At first glance, the field is

characterized by a wide diversity of approaches and forms. Upon closer examination and to the extent that it discloses itself as well established, it becomes homogenized, thus leading to the institutional isomorphism concept (DiMaggio and Powell, 1983).

The Institutional Theory understands that organizations in the same organizational field tend to grow more and more similar to each other, in accordance with imposed restrictions on their behavior. According to DiMaggio and Powell (1983), the concept that defines this homogenization process is the “institutional isomorphism”, which *“is a constraining process that forces one unit in a population to resemble other units that face the same set of environmental conditions”* (DiMaggio and Powell, 1983: 149).

The isomorphism develops through three institutional pressure mechanisms: coercive, normative and mimetic; these mechanisms all relate with the three institutional elements: regulative, normative and cognitive, respectively (Scott, 1995). The coercive isomorphism comes from formal rules, since laws and penalties ensure its compliance by the organizations. The normative isomorphism results from the professionalization provided by education centers and by disseminating information through entrepreneurial and professional networks disclosing converging regulations and techniques disseminated by the organizational field. On the other hand, the mimetic isomorphism emerges from social expectations related with other organizations’ conduct imitations, successes and/or leaders (DiMaggio and Powell, 1983; Scott, 1995).

The institutional pressures lead organizations to adopt structures, strategies and similar processes (DiMaggio and Powell, 1983; Meyer and Rowan, 1977; Scott, 1995). As a result, the isomorphism can be an element of advantage for the organizations as the similarity can facilitate interorganizational transactions and favor its internal workings by incorporating a set of socially acceptable rules (Fonseca, 2003).

The effect of the isomorphism process on organizations is legitimation, which refers to the need for acceptance and social support, prestige and compliance to organizational actions (Deephouse, 1996). Therefore, one of the purposes of the organizations is the achievement of social legitimacy. Suchman (1995: 574) states: *“legitimacy is a generalized perception or assumption that the actions of an entity are desirable, proper, or appropriate within some socially constructed system of norms, values, beliefs, and definitions.”*

Social legitimacy is an acquired status by the organizations through social actors (Ashford and Gibbs, 1990). According to Deephouse’s (1996) point of view, some particular social actors have the competence to ensure legitimacy. These actors are the government regulatory bodies with authority over organizations and public opinion that has the fundamental role of establishing and keeping acceptability standards (Deephouse, 1996).

A legitimate organization is that whose values and actions (organizational practices) are consistent with the social actors’ values and their expectations of institutional actions (Oliver, 1991). As a result, the achievement of legitimacy is linked to the achievement of social endorsement and acceptance of the environment in which it operates (Meyer and Rowan, 1977; DiMaggio and Powell, 1983).

In general, and according to the Institutional Theory, conformity with institutional pressures increases the probability of survival of the organizations (Deephouse, 1999; DiMaggio and Powell, 1983; Suchman, 1995; Meyer and Rowan, 1977).

3. THE INSTITUTIONAL THEORY IN TOURISM STUDIES

The Institutional Theory is applied with different purposes in tourism studies. The main research areas in which the Institutional Theory was used as a theoretical basis in tourism studies are: environmental, entrepreneurship, innovation, technologies, social responsibility, institutional arrangement, governance structures, public policy, and political trust (Table 2).

Table 2: Main research areas of Institutional Theory in Tourism

Sector	Research area	Authors
Tourism	Environmental	Strambach and Surmeier (2013); Rivera (2004); Shah (2011); Vargas-Sánchez and Riquel-Ligero (2010; 2011; 2012); Riquel-Ligero (2010; 2011); Riquel-Ligero and Vargas-Sánchez (2012a; 2012b; 2013); Grimstad (2011); Grimstad and Burgess (2012)
	Entrepreneurship	McCarthy (2012); Roxas and Chadee (2013)
	Innovation	Ottenbacher and Harrington (2009); Gyau and Stringer (2011)
	Technologies	Ali <i>et al.</i> (2013); Vatanasakdakul and Aoun (2009)
	Social responsibility	Sánchez-Fernández (2012)
	Institutional arrangement	Forbord <i>et al.</i> (2012); Karhunen (2008); Ingram (1998); Wilke and Rodrigues (2013)
	Governance structures	Lapeyre (2009); Lapeyre (2011a)
	Public policy	Wang and Ap (2013); Urbano <i>et al.</i> (2010)
	Political trust	Nunkoo <i>et al.</i> (2012); Nunkoo and Smith (2013)

Source: Own development

These tourism studies are mostly empirical, since only three are theoretical works (Ingram, 1998; Wilke and Rodrigues, 2013; Gyau and Stringer, 2011). The empirical application of the Institutional Theory is recent with the first study being published in 2004. However, between 2009 and 2013, a greater concentration of these publications was registered. A gradual, annual increase of publications was observed, with the height of publications of the Institutional Theory applied to the tourism sector occurring in 2013.

Most of the studies have components of tourism supply as an object of analysis, specifically hotel ventures (Rivera, 2004; Shah, 2011; Ingram, 1998; Wilke and Rodrigues, 2013), golf courses (Vargas-Sánchez and Riquel-Ligero, 2010, 2011, 2012; Riquel-Ligero, 2010, 2011; Riquel-Ligero and Vargas-Sánchez, 2012a, 2012b, 2013) and agricultural-based tourism clusters (Grimstad, 2011; Grimstad and Burgess, 2012). There are also studies evaluating the perception of the local resident communities about the tourism institutions (Nunkoo and Smith, 2013; Nunkoo *et al.*, 2012), as well as the innovating processes embraced by cuisine chefs (Ottenbacher and Harrington, 2009). However, there are no identified studies with the object of analysis – under the institutional perspective – involving tourist demand.

Regarding the geographical perspective, there are studies involving regional analysis (Nunkoo and Smith, 2013; Vargas-Sánchez and Riquel-Ligero, 2010, 2011, 2012; Riquel-Ligero, 2010, 2011; Riquel-Ligero and Vargas-Sánchez, 2012a, 2012b, 2013) as well as national analysis (Rivera, 2004; McCarthy, 2012; Roxas and Chadee, 2013; Wang and Ap, 2013; Ali *et al.*, 2013; Strambach and Surmeier, 2013; Lapeyre, 2011a; Lapeyre, 2009; Vatanasakdakul and Aoun, 2009). At the same time, there are also comparative studies between countries (Forbord *et al.*, 2012; Ottenbacher and Harrington, 2009; Shah, 2011), regions of the same country (Urbano *et al.*, 2010) and even comparisons between regions of neighboring countries (Sánchez-Fernández, 2012).

It prevails that the largest number of tourism studies carried out with the Institutional Theory is in the environmental area. These studies present a great deal of concern, mainly, with the pressures of the institutional environment influencing environmental management practices adopted by the tourism enterprises. They also present an analysis model which allows the measurement of significant Institutional Theory constructs such as the impact of three sources of institutional pressure (coercive, normative and mimetic) in the tourism organization's behavior and performance, as well as the effect of social legitimacy given by the social actors and reflexes from this effect in the organizational performance.

The rural tourism sector is a subject of analysis by Forbord *et al.* (2012) who describe the sector through three interdependent factors: products, organizations and institutions. Through comparative³ analysis, it is highlighted that, while regulatory prescriptions are the basis for top-down standardization, cognitive factors serve as a starting point for creativity and heterogeneity, bottom-up, in the tourism sector.

Wang and Ap (2013) also offer a sectorial analysis of tourism by describing the factors that affect the implementation of tourism policies in China, which comprehend the following: the socioeconomic macroenvironment, institutions, interorganizational relations and interest groups.

Another study within the research areas of "public policies" in tourism identifies in which way formal and informal institutions influence the conception and implementation of supporting policies for tourism companies (Urbano *et al.*, 2010). Through a comparative analysis between two Spanish regions, Urbano *et al.* (2010) states that, while formal (regulatory) institutions play an active part in the conception of supporting mechanisms for tourism business, it is the informal institutions (through socio-cultural factors such as cultural values, entrepreneurial activity, population education and social networking) that are the important determinants for its implementation.

In the investigation field regarding "governance structures", Lapeyre (2009; 2011a) uses the concepts of power and governance in the tourism field to understand why and how the actors bring up specific structures of governance to operate tourism activities, redistribute revenues and minimize transaction costs.

The two works of Renaud Lapeyre (Lapeyre, 2009; 2011) and the study by Urbano *et al.* (2010) are exclusively based on an economic perspective of the Institutional Theory, sustained by authors such as Douglass North, Clark Gibson and Oliver Williamson. This current institutional understanding seeks to explain how the institutional framework affects the organization's economic and social development. In turn, this generates the arguments of the regulative pillar.

Regarding the "political trust" (Table 2) that institutions can generate from residents of a tourism destination, Nunkoo *et al.* (2012) and Nunkoo and Smith (2013) identify connections between the concepts of legitimacy and trust when supporting that political legitimacy can only be achieved upon the confidence of the residents in the public administration.

Nevertheless, this review of the literature also allowed the identification of tourism studies that employ certain concepts or approaches of the Institutional Theory but are not exactly applicable as a theoretical study basis. Alipour and Kilic's (2005) work are some of the examples that take over the concept of "intuitionism" to analyze the structure of the Cyprus tourism sector. The "institutional support" approach, used by Lerner and Haber (2001), conclude that tourism developments with financial support by external resources show better performance compared to those that are completely self-financed. Initially, the "institutional arrangement" argument is used to assess the potential contribution of tourism companies of a communitarian basis in reducing poverty and empowerment (Lapeyre,

³ Comparative of three regions from different countries that possess some similarities in their natural environment and agricultural structure: North Tyrol (Austria), South Tyrol (Italy) and Norway (Forbord *et al.*, 2012).

2010). Subsequently, it is used to analyze the socio-economic impact of the tourism relations between community, public and private bodies in rural areas (Lapeyre, 2011b).

Wink's (2005) study about ecotourism and processes of collective learning also does not use the Institutional Theory as a theoretical perspective. Another example is Ateljevic and Doorne (2004) who concluded that the development of small tourism businesses is influenced, mainly, by existing governmental regulation.

3.1. Influence of the institutional context in the behavior of tourism organizations

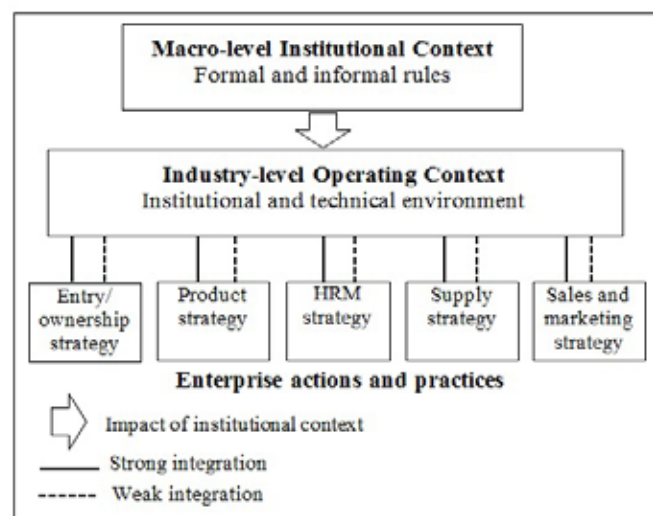
Different tourism studies prove the institutional environment influence over the different types of tourism organizations. There is evidence that different sources of institutional pressure impact in different degrees and organizational behaviors.

Especially in the "environmental" research area studies, a larger influence of the coercive pressures towards the normative and mimetic pressures has been identified in the adoption of corporative environmental practices. This has been empirically proved by Rivera (2004) in tourism studies in hotels and in golf courses (Vargas-Sánchez and Riquel-Ligero, 2013; Riquel-Ligero and Vargas-Sánchez, 2012a, 2013). Rivera (2004) states that hotels facing greater governmental monitoring are more likely to participate in voluntary environmental programs. Concerning golf courses, coercive pressures, followed by mimetic pressures, have a greater impact in the development of environmental practices.

The institutional context also plays a significant role in the use of communication and information technologies adopted by tourism organizations, as it is shown in studies undertaken in Maldives (Ali *et al.*, 2013) and in Thailand (Vatanasakdakul and Aoun, 2009). In the latest case study, for instance, normative and coercive pressures had a larger influence on the use of certain communication and information technologies by the Thai tourism industry rather than the mimetic pressures, which had no significant weight (Vatanasakdakul and Aoun, 2009).

The institutional perspective in studies about strategy considers the strategic choices of organizations as a result of the dynamic interaction between institutions and organizations (North, 1990; Oliver, 1997). With this point of view, Karhunen (2008) states that the institutional context comprehends formal and informal restrictions, strongly affecting the way hotel companies' strategies are integrated in the operational context, at the industry level (Figure 1).

Figure 1: Impact of institutional context on management of hotel operations



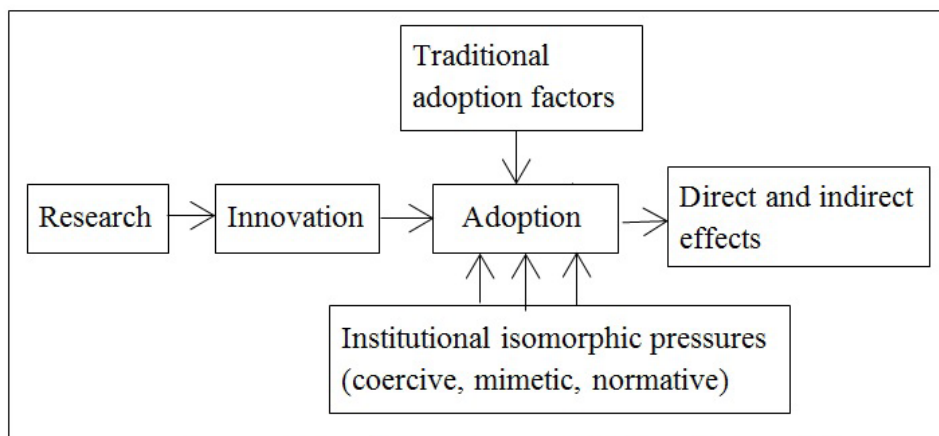
Source: Karhunen (2008: 31)

Karhunen (2008) is not concerned with the particular effect of each institutional source (coercive, normative and mimetic) but rather with the combined impact of institutional restrictions at an integration level of organizational actions and practices. It is important to take into account this perspective that considers the institutional environment effect in the organization's strategic choices (Karhunen, 2008), as well as the perspective that identifies the institutional effect in the innovation adoption by the tourism industry, which leads to the institutional isomorphism (Gyau and Stringer, 2011; Ottenbacher and Harrington, 2009).

Works cited by Ottenbacher and Harrington (2009) reveal that strategic decisions, as well as organizational and process innovations, are influenced by both top managers and the institutional environment context. Although institutional literature points out that institutional factors affect the organizational structures and the processes, little is known about how, where and why these factors occur. However, Gyau and Stringer (2011) and Ottenbacher and Harrington (2009) give a better understanding about such influences of the environment.

The theoretical model of Gyau and Stringer (2011) shows how the isomorphism process may influence the level of innovation adoption by the tourism industry (Figure 2). The authors state that the decision of innovation adoption by tourism operators may be influenced alone or in combination with the institutional pressures for the isomorphism. Additionally, when combined with the traditional innovation adoption factors, this model can offer a better understanding of these behaviors of tourism operators.

Figure 2: Conceptual model for institutional isomorphism and e-marketing adoption



Source: adapted from Gyau and Stringer (2011: 137)

Future empirical applications of Gyau and Stringer's (2011) model can, for instance, identify "what are the relative importances of isomorphic pressures and the traditional adoption factors in explaining tourism related innovations such as the e-marketing?" (Gyau and Stringer, 2011: 137).

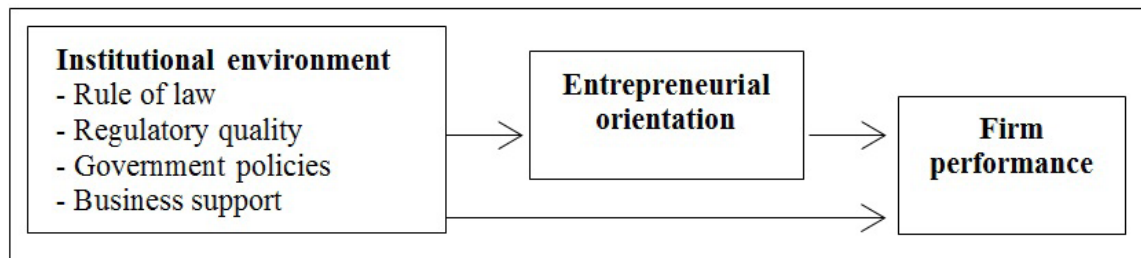
Ottenbacher and Harrington (2009) point out that studies about the innovation process, based upon the principles of the Institutional Theory, have given little attention to mimetic pressures. Faced with this insufficiency, Ottenbacher and Harrington (2009) analyze, in particular, the mimetic processes used to generate and execute new ideas by cuisine chefs with a Michelin star in North America and in Europe. They have discussed the potential impact of contextual, institutional and sociocultural factors as possible explanations for the similarities and differences between cuisine chefs. More specifically, towards institutional

factors, the authors provide evidence about the way they may affect the structure and process of culinary innovation.

The institutional environment can affect the tourism organization's performance as it is shown by the evidence (Vatanasakdakul and Aoun, 2009; Roxas and Chadee, 2013). More specifically, the normative pressure exercises significant influence in Thailand's tourism industry performance (Vatanasakdakul and Aoun, 2009), while the entrepreneurial orientation highlights the institutional environment effects over companies' performance (Roxas and Chadee, 2013).

Roxas and Chadee's (2013) model (Figure 3), identify a strong mediator effect in the relation between the institutional environment and the organizational performance. Results show that public administration plays an important role in guaranteeing that the institutional environment promotes entrepreneurship and, at the same time, an organizational performance improvement.

Figure 3: Effects of institutional environment and entrepreneurial orientation on firm performance: a conceptual model



Source: adapted from Roxas and Chadde (2013: 3)

There is also evidence in the institutional literature applied to the tourism sector that the institutional environment can cause changes in organizations' behavior regarding different institutional restrictions imposed on the organizations. Nevertheless, a contrary phenomenon may also occur where the organizational behavior causes changes in the institutions. This phenomenon is called "institutional change" and is related to a line of recent studies of the Institutional Theory, the "institutional entrepreneurship" (Haro, 2010; Bruton *et al.*, 2010), that considers the organization's influence (through the actions of managers and entrepreneurs) in these institutions, altering them. It defends the conception of organizations as active agents, not as passive ones, of the environment in which they reside.

This literature review of the Institutional Theory in tourism studies identified the work of McCarthy (2012), carried out in this line of institutional entrepreneurship, which comprehends the social entrepreneurial impact in the institutional context and in the shifting of institutional arrangements.

North (1990) stated that organizations are the main agents of the institutional change and that organizational learning is the main factor explaining this same change. Advancing on this finding, Ingram (1998) illustrates which actors affect the institutional change and how they do it by analyzing the institutional change in the education systems of the hospitality industry in the United States.

To Ingram (1998) there are distinct behaviors and organizational abilities between two different organization forms: the existent organizations and the new organizations. According to Ingram's (1998) conception, hotel chains are new incipient organizational forms and, therefore, understood as "new organizations". These "new organizations"

distinguish themselves from the existent organizations mainly because they are, somehow, free from those restrictions that prevent the existent organizations from benefiting from new knowledge. According to Ingram's (1998) point of view, the "new organizations" are, precisely, an important source of institutional change.

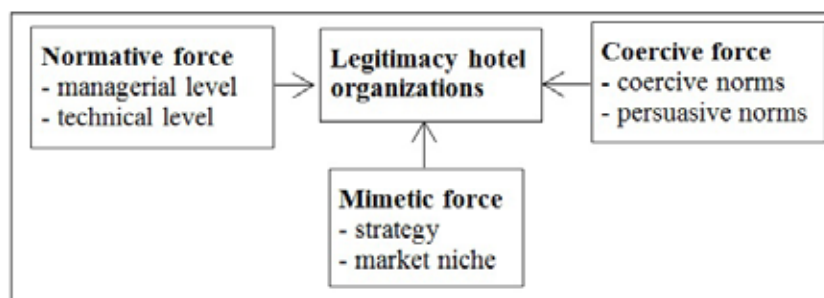
Ingram's (1998) theoretical discussion reveals a previous step in order to understand the behavior of tourism organizations and its implications for the institutional context that surrounds them. In that sense it is pertinent to highlight Roxas and Chadee's (2013) point of view that states that the institutional environment defines the entrepreneurial environment of those organizations in the tourism sector and that it can also determinate the entrepreneur who will be accepted and worthy of institutional support. The level of cooperation in an organizational field plays a relevant part in forming this institutional environment (Ali *et al.*, 2013).

3.2. Legitimation of tourism organizations

Social legitimacy is analyzed by tourism studies mainly in the environmental research area. There are studies that recognize the need of legitimacy as a driver of the corporate environment behavior (Riquel-Ligero, 2010, 2011; Riquel-Ligero and Vargas-Sánchez, 2012b, 2013; Vargas-Sánchez and Riquel-Ligero, 2010, 2011, 2012) and that the achievement of legitimacy reflects, for instance, the environmental responsibility of hotel organizations (Shah, 2011).

Wilke and Rodrigues's (2013) theoretical study differentiates the three institutional pressure sources regarding the legitimacy of Brazilian hotel organizations (Figure 4). The normative forces come from centers or from hotel training schools (technical and/or management expertise). Coercive forces come from coercive legal demands and/or from persuasive nature regulations. Mimetic forces come from the participation of executives or owners in the sector events which allow sharing solutions and decisions and/or adopting strategies directed to the attendance of specific hotel markets.

Figure 4: Concept assumptions of legitimation in the hotel organizations



Source: adapted from Wilke and Rodrigues (2013: 350)

Future empirical applications of this conceptual model allow an explanation of how and if organizations of the hotel industry use the legitimacy condition as a strategic instrument in favor of greater attractiveness of guests or in favor of a larger operational effectiveness (Wilke and Rodrigues, 2013).

Social legitimacy is confirmed as a mediator variable between the organizational performance and the organization's behavior, whether it is related to social responsibility practices in hotels (Sánchez-Fernández, 2012) or to the development of environmental practices in golf courses (Vargas-Sánchez and Riquel-Ligero, 2010, 2011, 2012; Riquel-Ligero and Vargas-Sánchez, 2012b, 2013; Riquel-Ligero, 2010, 2011). Through these works, evidence is identified that social legitimacy has been providing some priority over

the organizational performance; in other words, social legitimacy presents itself as a path to improve organizational behavior.

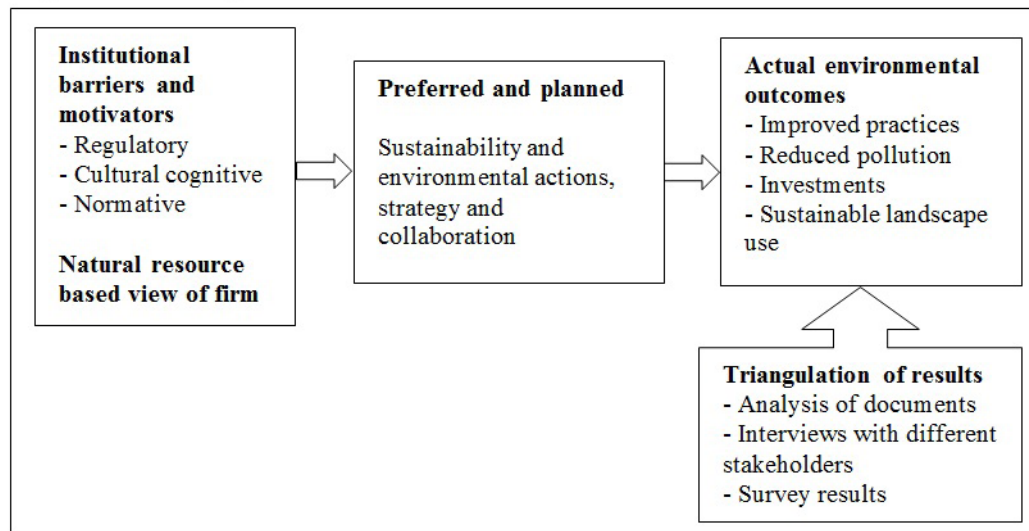
Such review of the literature also allowed identifying tourism studies that analyze the concept of legitimacy but that are not necessarily associated with the institutional perspective and its intrinsic assumptions. Some of these examples analyze the legitimacy in festivals (Ooi and Pedersen, 2010), the legitimacy associated with the involvement of the local community in tourist attractions (Garrod *et al.*, 2012) and tourist conservation projects (Cousins *et al.*, 2009; Hoffman, 2009) and the legitimacy related with sports tourism (Griffith, 2013).

4. INSTITUTIONAL THEORY APPLIED IN WINE TOURISM

The Institutional Theory was applied in the wine tourism segment in two of Sidsel Grimstad's works to analyze questions concerning organization's sustainability. These works are of greater theoretical significance not only in terms of pioneering, exploring questions of sustainability and companies' business decisions in clusters from an institutional perspective (Grimstad, 2011) but also because of the empirical evidence that provides tourism studies with an environmental focus (Grimstad and Burgess, 2012).

Both studies combine two of the organization theories having distinctive analysis perspectives: the Institutional Theory and the model of Natural Resource Based View of the Firm adapted from Hart (1995)⁴ (Grimstad, 2011; Grimstad and Burgess, 2012). With these theories, Grimstad (2011)⁵ arranges his conceptual model in order to understand how the social dynamic between actors inside the cluster may influence sustainability (Figure 5).

Figure 5: Conceptual framework of initiatives for sustainable tourism cluster



Source: Grimstad (2011: 76)

This model allows a discussion on how tourism business towards sustainability can be promoted or hampered by the institutional context. In this study, the sole focus is on

⁴ The model of Natural Resource Based View of the Firm comes from the Resource Based View Theory (RBV) and their fundamentals can be identified in Hart (1995).

⁵ This analysis model was presented, for the first time, in 2011 in the *International Journal of Wine Business Research*. It consists of an intra-industrial comparative study (involving two agriculture-based tourism businesses: the wine tourism cluster and the apple tourism cluster) between countries (Australia and Norway), with a mixed method approach interviewing different actors, inside and outside the cluster. The partial result of this comparative study was published in 2012, in the *Australia and New Zealand Academy of Management Conference*, relating the case study in the Australian wine tourism cluster (Grimstad and Burgess, 2012).

identifying how the Institutional Theory has been applied in wine tourism and what are the theoretical and empirical contributions to this tourism sector. The institutional perspective comes from the multi-level theoretical model from Brown *et al.* (2007), called the Value Adding Web, which analyzes the resources in the cluster, particularly the ways in which the context influences individual companies and the competitive advantage of the cluster.

Grimstad (2011) identifies the types of institutions (formal and informal), based on North's (1991) conception and how they impact the environmental initiatives of these companies in clusters. The results obtained in the Australian wine tourism cluster reveal that only 55% of the respondents identified external pressures to carry out environmental actions derived from corporative associations (which are relevant sources of knowledge about environmental questions), neighborhoods and clients. To a lesser extent, some pressure was felt from the State and Federal Government, whereas the local Government did not offer any pressure to engage in environmental action (Grimstad and Burgess, 2012).

Therefore, results point out the prevalence of the normative pressures over the coercive ones to the environmental initiatives in the Australian wine tourism cluster. This poor influence of the coercive pressures turns out to be surprising and paradoxical information since it is one of the main causes of behavioral changes for corporative environmentalism, as tourism studies show in other economy sectors (Hoffman, 2000; Clemens and Douglas, 2006; Riquel-Ligero and Vargas-Sánchez, 2013; Sánchez-Fernández, 2012; Riquel-Ligero and Vargas-Sánchez, 2012a; Riquel-Ligero, 2010).

According to Grimstad and Burgess (2012), one explanation for the poor coercive pressure is that it may be associated with most of the respondents (58%) having their own business focused on accommodation tourism activity, which is only a small percentage that has any kind of connection with agricultural activity. Typically, tourism activities have less industry control and regulations than agriculture production (Grimstad and Burgess, 2012).

Concerning the business typology, respondents with entrepreneurial tourism activity prevail. It is intended to show that this typology may compromise results, especially those of specific institutional forces that provide influence at this level, as it is understood in this case, for coercive pressure. If the sample of respondents having their businesses oriented towards agriculture (viticulture, for example) was more significant, the institutional pressures that provide influence at this level would probably be different. This hypothesis may be sustained by Grimstad and Burgess's (2012) considerations that the possible factors explaining the lack of influence of the regulator institutions may be associated with the type of business (entrepreneurial tourism or agriculture activity), the size of the business, the property structure and the agricultural knowledge about environmental questions.

4.1. Future studies in Wine Tourism with the Institutional Theory

Tourism literature has been doing poorly at trying to explain the wine tourism nature. There is a lack of research and information about how the economic activity aggregation of viticulture production occurs and identifying the causes and effects of wine tourism development in the organizational scope.

We support the point of view which states that the wine tourism development process in wineries may be explained through the aggregation of the tourism business component which is translated, mainly, in the provision of tourism services combined with the wine production. This aggregation can be seen as an innovative process that unleashes a new, strategic positioning of organizations.

Ingram's (1998) arguments allow a reflection about the features of wineries in developing wine tourism in their business, which proves to be significantly important while reflecting on the wine tourism nature.

In accordance with the wine tourism development concept previously defended and Ingram's (1998) point of view, wine tourism ventures can be considered "new organizations" with new organizational forms since, for instance, they developed new competences that allow them to aggregate new activities. They present new organizational arrangements differing from the wineries that do not have the wine tourism component in their business.

In these "new wine tourism organizations" the concept of "organizational⁶ inertia" is not applied, since they assumed the risk of an organization change and were able to learn and apply the new, necessary knowledge to such ends. However, one cannot consider that these "new wine tourism organizations" had lost an institutional stability referential in terms of their environment. Conversely, it became evident that these wineries – by being inserted in Wine Routes – have suffered a certain influence of this institutional body in developing wine tourism and also that this process may have some effect in the social legitimacy of these organizations.

Evidence gathered through Grimstad and Burgess's (2012) studies allow the realization that wine tourism ventures – by combining entrepreneurial agriculture activities and tourism activities – have suffered different influences and, therefore, different institutional pressures. Even though institutional pressure sources related with wine tourism had been analyzed according to environmental actions (Grimstad and Burgess, 2012), this provides the first evidence of pressures held in the institutional context for wine tourism. However, such findings provide an alert to the importance given to the business typology considered in the sample, as it can register a greater or lesser amount on a scale of an institution's influence and have direct reflections on the organization's social legitimacy.

As a result, the Institutional Theory also presents itself as a proper theoretical tool to explain the wine tourism development process with the behavior and organization practices of wine tourism ventures. Future studies may present concerns in understanding the wine tourism development process by wineries when considering the influence of an institutional context and its effect over those organizations' behaviors. Such questions had not yet been properly clarified within the specialized literature.

Specifically, there can be the pretension of knowing the institutional pressures of a Wine Route and how they influence the wine tourism development in wineries. This will allow testing some theoretical arguments of the Institutional Theory in wine tourism, such as the impact of legal aspects (coercive forces) as well as the moral values and social norms (normative forces) of a Wine Route on the wine tourism development process in wineries. The imitation of models and successful practices of other wine tourism ventures will allow the verification of the impact of mimetic forces.

Other future directions concerning wine tourism – with the use of the Institutional Theory – may describe relations between wine tourism and social legitimacy, as well as identify if the wine tourism development causes any effect in the social legitimacy of these wineries. This would verify if the theoretical argument of the social actors pushing organizations in the pursuit of legitimacy is also proved in the wine tourism case.

5. CONCLUSION

The Institutional Theory presents itself as a theoretical perspective consolidated in the Management area because of its conceptual thoroughness and theoretical consistency in the pursuit of answers to the problems involving organizations in the institutional context. However, it is still used infrequently in the tourism sector.

⁶ The argument of "organizational inertia" refers to the organizational failure risk caused due to an intraorganizational change (Ingram, 1998).

Tourism studies identified in this literature review appear to be tangential for future research proposals in the wine tourism industry as a scientific investigation area. Particularly, tourism studies carried out in environmental and innovation research areas seem to offer the best contributions and the ones nearer – in terms of analysis model, tested variables and goals – to the future research proposals to investigate wine tourism with the Institutional Theory previously presented.

More specifically, the two works carried out in the wine tourism industry (Grimstad, 2011; Grimstad and Burgess, 2012) are relevant starting points to further researches since they do not press ahead in certain aspects, whereas the Institutional Theory is able to give answers. For instance, they do not show any concern for questions surrounding the social legitimacy issue which proves to be remarkable in other tourism studies (Riquel-Ligero, 2010, 2011; Riquel-Ligero and Vargas-Sánchez, 2012a, 2013; Vargas-Sánchez and Riquel-Ligero, 2011; Shah, 2011; Sánchez-Fernández, 2012; Wilke, 2013).

In addition, concerning organizational performance, they are strictly focused on verifying results of environmental connotation, ignoring other dimensions which can be explored in this non-financial, organizational performance variable, such as operative and organizational aspects.

The presented gaps in the scientific knowledge demonstrate the need of future, in-depth research with the Institutional Theory in the tourism sector and, particularly, in wine tourism. It is suggested that future directions involve different concepts and institutional theoretical arguments.

One other suggestion for future studies is the use of other theories combined with the Institutional Theory. The Dynamic Capabilities Theory can be an example, as it has its analysis focus oriented to the intraorganizational aspects and can present itself as a complementary perspective to the Institutional Theory's interorganizational focus. This combination of other theoretical perspectives will allow a magnification of the analysis focus of a study as well as diminishing specific limitations still existing in the Institutionalism.

The theoretical development presented with this literature review contributes to gathering a theoretical discussion body of the Institutional Theory in the tourism and wine tourism sectors. It takes a step forward in the scientific knowledge by providing theoretical reflections for future research in Institutional Theory in wine tourism.

The theoretical implications presented provide clues about the behavior of tourism organizations and the institutional environment influences in these organizations that can generate practical implications to the public and private management of the tourism sector. Another relevant contribution of this study combines the few and still incipient researches in the tourism and wine tourism area with the institutional perspective.

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SPORTS EVENTS AS A TOOL TO LEVERAGE THE TOURISM DESTINATION IMAGE

EVENTOS DESPORTIVOS COMO MEIO PARA ALAVANCAR A IMAGEM DO DESTINO TURÍSTICO

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ABSTRACT

Sports events have been used to promote host communities in the global marketplace. A model of strategic leveraging of sport events was created by Chalip (2004), where one of the strategic goals is to “enhance host’s destination image”. This paper presents the findings of a research related with the leveraging process of a portfolio of nautical sports events hosted in a tourist community of Algarve- Portugal, in order to reinforce the destination image of one of its main tourist resorts - Portimão. A case study method was used in this research and fieldwork was conducted from February 2008 until June 2009, based on qualitative interviewing before and during the events, direct observation and documental research of the events. We analyzed the data using the qualitative content analysis (Mayring, 2000) through qualitative data software, the NVivo version 9 from QSR International. The empirical study showed that the strategic goal “enhance host destination’s image” was applied in the research setting and several actions were developed in order to implement it, which confirmed the application of the theoretical model proposed by Chalip (2004) in real contexts.

Keywords: Sports Events, Nautical Events, Leveraging, Destination Image, Tourism

RESUMO

Os eventos desportivos têm sido usados para promover as comunidades anfitriãs à escala global. Chalip (2004) criou um modelo de alavancagem estratégica de eventos desportivos, no qual, um dos objetivos estratégicos é “intensificar a imagem do destino anfitrião”. Este artigo apresenta os resultados de uma investigação sobre o processo de alavancagem de um portfólio de eventos náuticos realizados numa comunidade turística do Algarve/Portugal, cujo objetivo era o reforço da imagem do destino de Portimão. O estudo de caso foi o método selecionado, e o trabalho de campo foi conduzido de fevereiro de 2008 a junho de 2009. A recolha de dados foi constituída por entrevistas qualitativas antes e durante os eventos, observação direta e investigação documental acerca dos eventos do estudo. A análise de dados foi desenvolvida através da análise qualitativa de conteúdo (Mayring, 2000), utilizando o software qualitativo de gestão e análise de dados NVivo, versão 9 da QSR Internacional. O estudo empírico demonstrou que, o objetivo estratégico “intensificar a imagem do destino anfitrião” foi aplicado no contexto estudado, e que várias ações foram desenvolvidas com o objetivo de implementar este objetivo, o que confirma a aplicação do modelo proposto por Chalip (2004) em contextos reais.

Palavras-chave: Eventos Desportivos, Eventos Náuticos, Alavancagem, Imagem do Destino, Turismo

JEL Classification: L83, M31

1. INTRODUCTION

Sports events have been used as a way to attract tourists, playing an important role in the strategic plans of cities, regions and countries, promoting these host communities in the global marketplace. A new line of research based on a pre-event strategic approach was started by Chalip (2004) in order to leverage the events to benefit the host destination. The author created a leverage model to explain this type of approach. Weed (2009), in a seminar article of meta-analysis in sport tourism domain suggested that the leveraging concept could be a bridge between the research about behaviors, politics, impacts and others, assuming a central role in the future research of sports tourism. However, the research in this area reinforces the necessity of the empirical verification of these models, a more comprehensible analysis of the strategic management of sports events portfolios and the application of the leverage approach to small scale events (O'Brien, 2007).

The present paper aims to examine the leverage process of a nautical sports events portfolio hosted in a tourist community of Algarve-Portugal (namely: Kite Masters Portimão World Tour, Formula Windsurfing World Championship, Sailing Audi Medcup, P1 Power Boats World Championship, Portimão Global Ocean Race and F1 H2O World Championship), by identifying the strategic goals and analyzing the implementation process related to leverage of events to “enhance host destination image” according to Chalip (2004) model.

The article starts with a theoretical background focused on the applied model to approach the purposeful sampling (Patton, 1990), followed by a description of the methodology and a presentation of the results with an analysis in terms of the strategic goals and their implementation. The concluding remarks intend to establish the main conclusions, and contribute to reach higher leveraging of a portfolio of sports events.

2. LITERATURE REVIEW

The majority of the studies in sports events have been focused on their impacts, specifically: environmental, tourism, destination brand, social, urban requalification, politics and, above all on the economic impact (Weed, 2009). However, Getz (2000) highlights the importance of integrating the development of events in the overall strategic planning of tourism, economy, marketing and social domains, and he also reinforced the relevance of accomplishing the strategic approach with research in this area.

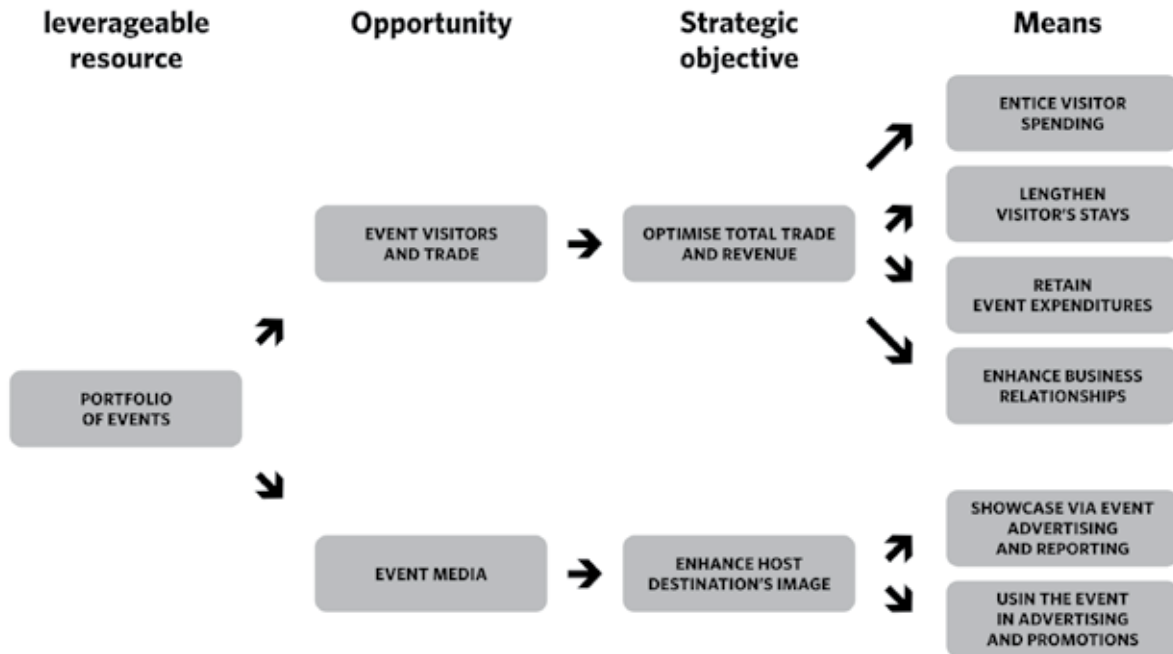
In fact, a new trend in sports events research has taken its first steps in beginning of the century. This is based on a pre-event approach and advocates that the benefits of the events depend on the way they are leveraged. This approach has been developed by several authors: Chalip (2000, 2004, 2006), Chalip & Leyns (2002); Green, Costa, & Fitzgerald (2003); O'Brien (2006, 2007); and O'Brien & Gardiner (2006).

Chalip (2000) was the first to apply the concept of “leveraging” to sports events. He analyzed the strategies used by Australia to enhance the Olympic Games in view of tourism and proposed a line of research with an emphasis on the leveraging benefits of an event. The

author defined leverage as “getting the best possible benefits from the event” (2004, p. 228) and emphasized that a strategic leveraging approach is crucial to clearly define the benefits for the host communities, in order to maximize the benefits with the appropriate actions.

This line of research developed a model to leverage the portfolio of events with two strategic goals (Chalip, 2004, p. 229): “optimize total trade and revenue” through the opportunity created by the events visitors and trade, and “enhance host destination’s image” via the media attracted by the event (figure 1).

Figure 1. Chalip’s model for host community event leverage



Source: Chalip (2004, p. 229)

This model integrates opportunities for host community to achieve both immediate and longer-term benefits. “Optimize total trade and revenue” should be developed in order to maximize short-term benefits, and “enhance host destination’s image” seeking to achieve longer-term benefits. The first one is mainly related to the definition and design of several actions:

- “entice visitor spending”, namely tickets promoting the image of the local attractions, souvenirs of the events and of the host community, themed restaurants, alternative social programs for accompanying markets (e.g., sons or wives);
- “lengthen visitor’s stays”, for example by offering hotels’ special packages and cultural packages of the local community;
- “retain event expenditures”, through the offer of local products or working with local suppliers;
- “enhance business relationship”, with the creation of business bureau or corporate programs.

The second category comprises two means related to the capitalization of the media; one of them is to “showcase via event advertising and reporting”, as for example the organization of tours to local heritage resources with journalists and other media staff, or the selection of the best local spots with potential for events venues. The other one is to “use the event

in advertising and promotions” making it an enriching part of the destination’s portfolio of products.

The development of an event portfolio is the way to build or sustain the impact of events on the destination brand, by hosting events throughout the year and by finding means to create synergy among them (Jago, Chalip, Brown, Mules, & Ali, 2003; Chalip & Costa, 2005).

The model above was applied to analyze the organization of a surf festival held in a region of Australia and concluded that stakeholders must have a more strategic approach to the sports events in order to induce benefits (O’Brien, 2007). The author realized that the Festival’s website highlighted the region’s natural beauty and was reported in the national and international surfing magazines. He verified that smaller sporting events can also have the potential to contribute to the development of the community. In this perspective, several authors (Chalip, 2005; Higham, 1999; Higham & Hinch, 2002; Wilson, 2006) recognized the importance of “small-scale sports events” to the host communities, namely concerning the creation of competences related to host major events, and complementing the scale of the events hosted by the community. Gibson, Kaplanidou, & Kang (2011), showed how a portfolio of six small scale events contributed to the economic, social and environmental development of the host community.

3. METHODOLOGY

A case study method was used in this research because on one hand we studied a contemporary phenomenon in its natural setting and, on the other, its boundaries with the general context were not explicitly defined (Yin, 2003). This method also fits with questions like “how”, allowing us to analyze and understand the implementation process of sports events’ leveraging (Yin, 2003). The research context is explained below, before sections that address data collection and analysis, respectively.

3.1. Research context

Portimão is a tourist resort in Portugal’s major tourism region – Algarve - which has been qualified as a mass tourism destination based on the sun and beach product, and related to a specific urban growth model. However, Portimão is a privileged town, set at the flank of a lagoon, a river and the sea, comprising a destination proven of great potentiality by previous studies advocating the need for further investments (Center of Research and Development of the Regional Economy, 2004).

The selection of the case study “leveraging the portfolio of nautical sports events in Portimão” was a purposeful sampling (Patton, 1990). The main criteria was theoretical and based on the potential of the portfolio in representing the theoretical constructs of the selected model (Patton, 1990; Silverman, 2005). This portfolio revealed itself as a rich research case. Moreover, an event-based strategy was defined by the political apex, having a Municipal Public Undertaking been created in order to implement the event-based strategy, with the mission of promoting tourism, supporting events and developing tourism products, namely sports, cultural and business tourism (Expo Arade, 2006).

For this study we selected a set of international sports nautical events carried out during a year’s term, according to a portfolio approach as recommended by the literature (Chalip, 2004; Chalip & Costa, 2005; Getz, 2005; Jago et al., 2003). The events were organized by specialized divisions of this public company (events’ sector and tourism sector) in co-operation with other divisions of the municipality, namely the information and public relations office. In the course of the article, we will refer to this set of actors as the local public

event organization committee (LEOC). Most of the time, the Public Undertaking appears with a double role - as the main sponsor and as the local event organization committee (LEOC) - always in coordination with the external private organizations holding the rights of the events (external event organization committee - EEOC). Table 1 displays the events in chronological order.

Table 1. Events' portfolio in chronological order

EVENTS	DATE
Kite Masters Portimão World Tour (KM)	8 - 13 July 2008
Formula Windsurfing World Championship (FW)	9 - 14 September 2008
Sailing Audi Medcup (AM)	15 - 20 September 2008
P1 Power Boats World Championship (P1 PB)	26 - 28 September 2008
Portimão Global Ocean Race (PGOR)	12 October 2008 to 20 June 2009
F1 H2O World Championship (F1 H2O)	4-5 April 2009

Source: Own elaboration, 2013

3.2. Data Collection

Fieldwork conducted from February 2008 until June 2009 was based on qualitative interviewing before and during the events, direct observation and documental research. Our data collection is based on a sensitizing device (Klein & Myers, 1999) established according to the theoretical framework of the sports events leverage model (Chalip, 2004). The "enhance host destination's image" dimension comprised two means: "showcase via event advertising and reporting" and "use the event in advertising and promotions". These were the embryo of the set of questions creating the semi-structured interviews and role analyses parameters used to observe data. The focus was the identification of this dimension on the strategic goals and their implementation in a specific nautical sports events' portfolio.

According to Patton (2002), we selected an approach based on an interview guide, in which the topics and issues were previously specified and outlined. The following table (n. 2) shows the main parts of the script as well as the topics for the open questions.

Table 2. Categories of interviews by topics

CATEGORIES	TOPICS
PART A Strategy of the events	- strategic goal - reasons for the decision making - actors of the decision making
PART B Strategic leveraging	- leverage actions related with "enhance host destination's image" - actors involved with the actions - actions developed after event

Source: Own elaboration, 2013

The sampling criterion of the individuals was based on the theory of sports' events (Flick, 2005; Patton, 1990). According to Parent (2008, p. 136), event stakeholders are "the formally recognized or "official" actors, as well as the informal or often overlooked constituents such as special interest groups and local residents. ...Other stakeholders include the organizing committee's paid staff and volunteers; the various levels of government; the residents, sponsors, businesses, schools, and community groups composing the community; the international, continental, national, and provincial sport organizations; the print, radio, television, and internet media; and the athletes, coaches, VIPs, officials, and support staff composing the delegations". Regardless of this diversity, our focus was in the actors whose actions could take advantage of the event media to "enhance host destination's image", namely: LEOC and EEOC actors, political actors (PA) and the partners/sponsors (PS).

During the research process 61 interviews were carried out in person, each lasting one hour in average. The interviewees were carefully chosen among decision makers, senior executives and operational staff of the different organizations. Although the majority of the interviewees integrated the strategic apex of the different groups, the selection of informants was intentionally diversified (Lofland, Snow, Anderson, & Lofland, 2006; Patton, 1990). The opinion of actors from different groups and from different levels contributed to the triangulation of information sources and, thus, to the quality of the research.

The on-site observation was a relevant part of this research, allowing us to come into contact with the real practices (Edwards & Skinner, 2009; Flick, 2005). Direct observation of all the events was performed for an average of six days (two days before, during and one day after). We used an observation protocol (Spradley, 1980) based on the sensitizing devices of the theoretical model (Chalip, 2004) and focused on the implementation of actions related to "enhance host destination's image". The observation protocol was composed by the following parts: 1) description of the social and physical context; 2) focused observation, in which we analyzed the progress of the different actions, the actors and their interactions. We also took daily notes on our experiences, contacts and reflections (Spradley, 1980).

During the whole research process, information was gathered in the form of strategic documents, contracts, websites, flyers, newspapers and press releases of the events. This began in early 2008, having been collected seventy nine documents. The documents assumed an important role in this research as a contribution to confirm and validate the evidence from other sources (Yin, 2003) and triangulating the data (Edwards & Skinner, 2009; Myers, 2009). Table number 3 displays the different techniques of data collection used in each event.

Table 3. Distribution of the data collection techniques by event

DATA COLLECTION TECHNIQUES	Kite Masters	Formula Windsurfing	Sailing Audi MedCup	P1 Power Boats	Sailing PGOR	F1 H2O	Total
Interviews (number of interviews)	10	7	8	7	17	13	61
Observation (number of days)	9	8	8	7	4	4	42
Documents (number of documents)	12	11	9	13	24	10	79

Source: Own elaboration, 2013

As progressively shown above, the triangulation of different levels and types of sources, and several techniques of data collection (i.e. interviews, observations and documents) was pursued in order to guarantee the quality of the research (Flick, 2005; Stake, 1995).

3.3. Data analysis

We used qualitative data software for data management and analysis, namely the NVivo version 9 from QSR International. This tool allowed us to create: 1) “nodes” based on the conceptual framework, each one representing a category of the model; 2) a case “node” for each event, which was used to compare the different events.

We analyzed the data using the qualitative contents analysis approach (Mayring, 2000). The coding procedure consisted in: 1) the identification of the strategic goal “enhance host destination’s image” in the context of the case; and, 2) the implementation of actions developed by the different actors to leverage each event of the portfolio according to the model created by Chalip (2004). Mayring (2000, p. 4) highlights that “deductive category application works with prior formulated, theoretical derived aspects of analysis, bringing them in connection with the text”.

4. RESULTS

This section starts by the analysis of references related with “enhance host destination’s image” as a strategic goal, following a description of the related implemented actions.

4.1. Strategic goal

The analysis of the events’ strategic goals was important to identify if the conceptual goal “enhance host destination’s image” fits the research context. The data showed that leveraging the events to “enhance host destination image” was consistently found in all the events and manifested by all levels of actors (political, strategic and operational). Table number 4 displays the references related to each event.

Table 4. Strategic goal: sources and references encoded for each event studied

	Kite Masters		Formula Windsurfing		Sailing Audi MedCup		P1 Power Boats		Sailing PGOR		F1 H20	
STRATEGIC GOAL	Sour.	Ref.	Sour.	Ref.	Sour.	Ref.	Sour.	Ref.	Sour.	Ref.	Sour.	Ref.
Enhance Host Destination’s Image	4	7	5	11	6	11	6	9	7	15	4	5

Source: Own elaboration, 2013

The table below (n.5) displays the references made by the different groups of actors.

Table 5. Strategic goal: number of references according to groups of interviewees

STRATEGIC GOAL	INTERVIEWEES GROUPS			
	LEOC	EEOC	Political Actors (PA)	Partners/ Sponsors (P/S)
Enhance Host Destination's Image	49	18	16	14

Source: Own elaboration, 2013

These results reinforce the relevance of this goal for the different groups, namely their perception of the main purpose of the events. The table below shows different statements related with the goal “enhance host destination’s image” mentioned by the actors of the LEOC and EEOC involved in the events.

Table 6. Strategic goals according to the actors: some evidences

STRATEGIC GOALS	KEY-WORD	EXAMPLE
Enhance Host Destination's Image	Promotion	“Promotion, promotion and promotion of Portimão is a fundamental idea, because it has been required that cities create the critical success factors to enable them to be competitive, being that a critical success factor to the competitiveness is to know how to make a difference by promoting an image of a dynamic and young city. The events contribute to this dynamics, youth, entertainment, and are interconnected topics that are deeply related to this strategy” (Political actor 1)
	Image	“The specific priority of the Sailing Audi MedCup is to promote the image of Portimão in the foreign market and among the sailing elite” (LEOC – strategic actor 4 - AM)
	Brand	With this event and also with all the others with world level, we want to create a brand, positioning the brand Portimão (LEOC – operational actor 4 - F1 MT)
	Image	“The event is a product designed to broadcast the image of the tourist resort to the world.”(EEOC – strategic actor 1)
	Positioning	“People in America have never heard of Portimão. In fact, we are taking the city to 98 different countries and to 20000 spectators. What we get is the opportunity to create a message, and control it, by saying: Portimão is the best city, come to Portimão and relax for two weeks, see the P1 and play golf, and sail, and windsurf, and the food is brilliant and etc ... we have the ability to broadcast that message in our television shows and this is really important.” (EEOC – strategic actor 6) “A few years ago, the Portimão Municipality decided to develop an event based strategy as a way to quickly promote and enhance its image and strengthen its positioning.” (LEOC – strategic actor 1- KM)

Source: Own elaboration, 2013

The documental analyses showed that goals related with the destination image dimension were part of the mission statement of Expo Arade in the Provisional Management Instrument: “to promote activities and events with media impact, combined with strategies and actions promoting tourism, economic and social development of the community” (Expo Arade, 2008, p. 2). The events’ contracts also corroborated the importance given to the destination promotion, as shown by the contractual clauses listed in table 7.

Table 7. Scope of the goals: contractual references related to the destination image by event

EVENTS	SCOPE OF THE GOALS
Kite Masters	Internacional television broadcast
Formula Windsurfing	Event and municipality promotion (without contract, just email agreements)
Sailing Audi MedCup	Municipality and Expo Arade promotion Awareness
P1 Power Boats	Promotion of Portimão brand as a holiday destination
Sailing PGOR	Promotional benefits for Portimão as a title sponsor of the race
F1 H2O	Promotional benefits

Source: Own elaboration, 2013

4.2. Actions implemented

The findings indicate the development of a large number of actions related with “enhance host destination’s image”, in a total of one hundred and sixty two actions. The table below (n.8) shows the number of actions developed by each group. As per the data shown in this table, it is possible to verify that the majority of the actions were developed by the LEOC and EEOC. The contribution of the political actors and partners/sponsors was limited.

Table 8. Number of actions developed according to the different groups of actors

EVENTS	Groups of Actors	Enhance Host Destination’s Image Actions
Kite Masters	LEOC	12
	EEOC	9
	PA	0
	P/S	1
Total		22
Formula Windsurfing	LEOC	11
	EEOC	13
	PA	0
	P/S	1
Total		24
Sailing Audi MedCup	LEOC	10
	EEOC	21
	PA	1
	P/S	3
Total		34
P1 Power Boats	LEOC	15
	EEOC	13
	PA	1
	P/S	1
Total		30
Sailing PGOR	LEOC	15
	EEOC	7
	PA	1
	P/S	0
Total		23

EVENTS	Groups of Actors	Enhance Host Destination's Image Actions
F1 H2O	LEOC	18
	EEOC	10
	PA	1
	P/S	1
Total		29
TOTAL		162

Source: Own elaboration, 2013

The actions to “enhance host destination’s image” will be analyzed according with the two categories of the theoretical model: “showcase via event advertising and reporting” and “using the event in advertising and promotions”. According to the data, the majority of actions was related with the “showcase via event advertising and reporting”.

Table 9. Number of actions in each event by actions category

EVENTS	Showcase via event advertising and reporting	Use the event in advertising and promotion
Kite Masters	15	7
Formula Windsurfing	16	8
Vela Audi MedCup	24	10
P1 Power Boats	24	6
Vela PGOR	17	6
F1 MT	22	7
TOTAL	118	44

Source: Own elaboration, 2013

4.2.1. Showcase via event advertising and reporting

The events’ contract clauses focused on the image and promotion of the destination as the main responsibility of the EEOC. All of the events’ contracts included clauses related to mandatory submission of documentary evidence concerning the actions carried by the EEOC for the events. For example, the EEOC obligations were clearly expressed in the 5th clause of one of the contracts, as transcribed bellow:

Line 2. Ensure and guarantee television coverage of the event through highlights

Line 3. Ensure and guarantee television coverage of the event through highlights in international television

Line 10. Ensure the enclosure of the logos “Portimão Municipality” and “Expo Arade” in all promotional material created and / or produced of the event.

Thus, the brand Portimão was a mandatory part of contracts, some of which included the embedding of the destination's name into the event logo itself, as the case of the Portimão Global Ocean Race.

Moreover, several actions were established by LEOC to achieve this goal, namely the specification of the best places to capture images of the tourist destination, and the processing of the images to be broadcasted by the EEOC. As one of the members of the LEOC stressed:

The Tourism Division indicates to the external promoters which pictures to distribute at an international level. These images will be publicized simultaneously with the daily information of the event. (LEOC – strategic actor 3 - KM)

We observed the LEOC actors constantly and carefully supervising the event area and the exposure of the naming Portimão - banners, flags, streamers – guaranteeing the maximization of its projection through the media and local visibility. For example, in the Kite Masters event we observed twenty flags and ten banners with the brand Portimão.

Figure 2. Portimão brand's showcase in the Kite Masters event



Source: Elsa Pereira, 2008

As a LEOC actor said:

One of the issues covered at the initial meetings was the definition of the most suitable areas to project the image of the Municipality. We must get something with the event. People must see the event on TV and say - what a beautiful beach! Where is this? - And when they look better they visualize the name of Portimão. (LEOC – operational actor 3 - KM)

In all the events, several actions regarding “showcase via event advertising and reporting” were implemented, especially in the Sailing Audi MedCup, the Power Boat and the F1 H2O. In some events, as Kite Masters, Formula Windsurfing, Sailing Audi MedCup and the Power Boat, a tour with journalists and TV crew from the national and international media was organized by the LEOC to privileged sites and new facilities in the region, with the objective of promoting the destination brand in the event documentaries: “we create a visit program for those reporters to some key points of the city, which is set up with the Tourism Division. This is one of the most fruitful actions because it gets people to write about Portimão” (LEOC – strategic actor 4 - AM).

We also observed a special social program organized by the LEOC for the press in the Audi MedCup event. This program included a visit to the new city museum, a tourist train tour in the city, a typical dinner in a traditional restaurant and a Fado performance. As we observed, sixty eight national and international journalists joined this program and were

very pleased with the Municipality's offer. Another example, in this event, was the creation of a stand to promote Portimão, inside the VIP pavilion.

The LEOC also organized a national TV show broadcasting from the VIP lounge of the P1 Power Boat event, during which we observed the presence of a traditional restaurant chef preparing a very typical meal in an improvised kitchen. A fisher man explained the fishing arts in the Portimão area and the city museum was presented by its director. In this TV show, the president of the Municipality also spoke, publicizing the requalification of facilities in the "Praia da Rocha" beach, the most famous beach in the south of Portugal.

In the F1 H2O event, the LEOC elaborated an official catalogue which was distributed in a weekly national newspaper with one of the highest circulation levels. Once again, the goal here was to promote the destination image as we were told by one of the LEOC actors:

It is mandatory to have this official catalog in major international events, and in the beginning we only made its distribution locally. But in the recent years we also adjusted it to the national level. We started to use this catalog to promote the image of Portimão as an ultimate nautical stage and as a tourist destination in the general sense. (LEOC – strategic actor 4 - F1 H2O)

The EEOC also gave priority to this category. As we observed, several actions were carried out to advertise the host destination throughout the events. The promotion of the host destination was always emphasized in the official website and in the press releases of the events. The naming "Portimão" was visible in all event material, namely the podium backdrop, boats, sails, cup and other prizes. The picture bellow shows this, namely in the lycra, the cup and the podium backdrop.

Figure 3. Example of the naming "Portimão" in the event materials



Source: Elsa Pereira, 2008

One of the EEOC actors highlighted:

We put the sponsor's name in the lycras t-shirts because when you make an image in water or out of water there is a concern to film the athletes. We also print it on the sails, always in the area above the boom, since it's the most visible in camera shots and creates greater impact. Both sides of the sails are always reserved for the sponsors of the event title. (EEOC – strategic actor 2)

During our observation of the Sailing Audi Medcup event, the priority of the EEOC concerning the destination image was perceived of great importance in the press center - a very comfortable area with several amenities - to attract as many journalists as possible,

having reached almost eighty national and international journalists. According to an EEOC member: “this space has some fine distinctions: in the morning there are some small courtesies for the journalists in the lobby, and we serve champagne and a meal in the evening” (EEOC – operational actor 4).

4.2.2. Using the event in the promotion of the destination

In the empirical study we verified actions developed in order to “use the event in the promotion of the destination” as described in the theoretical model. The events hosted by the destination were advertised: 1) inside the nautical guide of Portimão, in which the nautical related services are promoted; 2) in the promotional fold-ups and catalogues of the destination with titles like “Portimão, the stage for major nautical events” or “Portimão, the stage for great excitement”, where the major nautical events in the Municipality were advertised. They always used images of the nautical events to decorate Portimão’s promotional stands in fairs related to tourism, sports, nature and leisure, where the main message was the connection of Portimão to a nautical destination (LEOC – strategic actor 2, 3 - KM and 4 - FW).

These actions were also a way to integrate the events in a portfolio logic, in which the nautical destination message was broadcasted in a systematic approach in several media platforms. The figure below is an example of this kind of message in the F1 H2O catalogue.

Figure 4. “Portimão: the best nautical events pass through here” - slogan in the official catalogue of the F1 H2O event of 2009



Source: Portimão Municipality, 2009

The LEOC took the opportunity of this type of annual multi-stage circuit organization, integrating a tourism promotional stand of Portimão and the global communication plan, throughout the cities hosting the P1 Power Boat event (LEOC – strategic actor 3 - P1 PB and LEOC – strategic actor 4 - AM; EEOC – strategic actor 5). We perceived this to be an

interesting and important action as a way to “enhance host destination’s image”, adding value to the theoretical model. As a LEOC actor stated:

Basically we just integrate an already defined circuit and the entire machine that the whole circuit organization represents, so that we benefit from the MedCup’s communication program (LEOC – strategic actor 4 - AM)

Overall, data analysis shows that several actions were undertaken to leverage the events, in order to enhance the image of the destination, so often unplanned (LEOC – strategic actor 2 - KM; LEOC – strategic actor 3 - P1 PB; LEOC – strategic actor 4 - FW, P1 PB, F1 H20), trying to take advantage of opportunities as demonstrated by the following assertions: “we are talking about two top journalists that I have mentioned and then six more journalists are already scheduled on Sunday, all international and eventually I’m waiting to be told if there will be some Saturday visit or not. This is a dynamic management” (LEOC – strategic actor 3 - P1 PB). Another one said:

This is primarily a work of communication strategy that takes advantage of the uprising opportunities to enhance what is being done (LEOC – strategic actor 4 - FW)

Portugal Tourism Board and Regional Tourism Board were also sponsors of the majority of the events through the same program *Allgarve*. Nonetheless, different approaches were developed by each organization. As a strategic actor of the first organization made reference: “we do a set of public relation actions for the press, to foster and potentiate the destination image” (partner/sponsor 1), which contributed to “enhance host destination image”. The Regional Tourism Board showed a more operational approach, as one of their strategic actors stated: “our participation was more logistics and in the field with the outdoors” (partner/sponsor 4).

5. CONCLUSION

The strategic objective integrating the economic model (Chalip, 2004), namely “enhancing the image of the destination” was explicitly mentioned by most interviewed actors of the various levels (political, strategic and operational) at all events. This objective was also set in the contracts of the different events and for which we observed several implementation actions at all events, which allows proving the application of this model in a real context related to “enhancing the image of the destination”.

In general, actions to “enhance the image of the destination” were carried out by the actors of LEOC mostly in coordination with the EEOC actors. In most cases, these actions resulted from a joint effort between the LEOC and EEOC actors, also involving journalists, press agents, tour operators and other media partners. We noted along the field work, that the actors of LEOC took advantage of opportunities to promote the image of the destination, even without previous planning.

We concluded that the actions taken have further strengthened the consistency of promotional messages, by building a nautical destination image based on hosting nautical sports events (Chalip & Costa, 2005; Jago et al., 2003).

Moreover, we found that the portfolio of events held throughout the year and developed to integrate the different events in a nautical portfolio, contributed to the sustainability of the destination brand (Chalip, 2004; Chalip & Costa, 2005; Ziakas, 2010).

Finally, we realized that events organized in circuits offer additional opportunities to promote the destination throughout the different venues, cities and countries.

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TOURISTS' EXPERIENCES SPATIO-TEMPORAL EFFECTS ON THE DESTINATION IMAGE. A THEORETICAL MODEL

AS EXPERIÊNCIAS TURÍSTICAS E OS EFEITOS ESPAÇO-TEMPORAIS NA IMAGEM DOS DESTINOS. UM MODELO CONCEPTUAL

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ABSTRACT

In the present era of social and media mobility the importance of meeting and exceeding the tourists' needs by offering added value is a key factor to the future and sustainability of any region or tourism destination. However, the financial resources available are gradually scarcer and managers need to find alternative ways to provide added value at lower cost. One option at their disposal is to deliver unique and powerful experiences that may enable tourists to feel engaged with the destination and ultimately satisfied. Despite of the extensive research of previous studies regarding the destination image and the tourism experiences, few have captured in a holistic perspective, the relationship between both constructs. Thus, this paper purpose is to assess the image of the Algarve, before and after the tourism experience at the destination to evaluate the impact(s) of the different tourists' experiences and its relationship with the tourism destination. The spatio-temporal conceptual model presented, will be later verified using confirmatory factor analysis (CFA) and structural equation model (SEM).

Keywords: Tourism Experiences, Destination Image, Image Formation

RESUMO

Na presente era da mobilidade social e dos media, a importância de atender e superar as necessidades dos turistas, oferecendo valor acrescentado, é um fator-chave para a sustentabilidade de qualquer região ou destino turístico. No entanto, os recursos financeiros disponíveis são escassos, e constantemente os gestores precisam de encontrar formas alternativas de oferecer valor acrescentado ao seu serviço a baixo custo. Uma das opções à disposição dos gestores é a de proporcionar experiências únicas e poderosas que conduzam os turistas a *sentir* o destino, com vista a conseguir a sua satisfação. Apesar de estudos anteriores terem abordado a imagem do destino e a experiência turística, poucos capturaram numa perspetiva holística, a relação entre ambos os constructos. Assim, este estudo tem como objetivo avaliar a imagem do destino Algarve, na chegada e na partida dos turistas, bem como, a sua experiência turística no destino, para avaliar o impacto (s) das diferentes experiências dos turistas na imagem do destino turístico. O modelo conceptual *espaço-temporal* apresentado, será verificado através da análise fatorial confirmatória e do modelo de equações estruturais.

Palavras-chave: Experiência Turística, a Imagem de Destino, Formação de Imagem

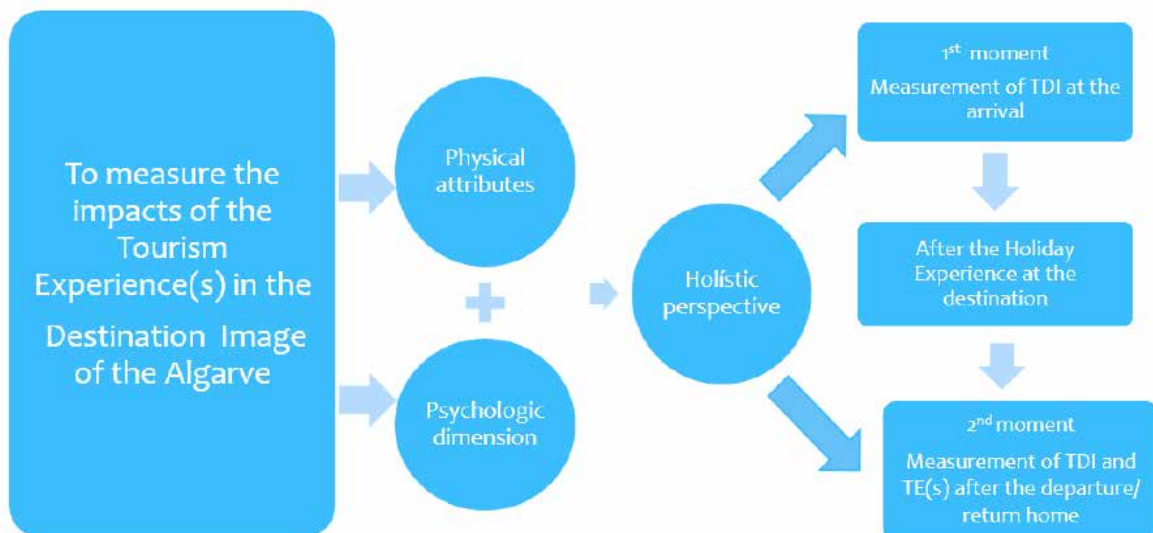
JEL Classification: L80, L83

1. INTRODUCTION

The recession among European countries has brought to the spotlight the importance of the tourism activity, due to its economic growth in certain countries resulting from increasing number of tourists' receipts. But, despite of this new and pleasanter outlook, the problem remains for most marketers and managers, since the tourism market is full of similar and confusing messages. In this process they must be sensitive to the fact tourists no longer buy or choose destinations based on facts or rationality (Holbrook, O'Shaughnessy & Bell, 1990), but also for the meaning each destination represents for them (Levy, 1959; Pine & Gilmore, 1998; Hudson & Ritchie, 2009), e.g. that is the experience at the destination. They must also be aware, the competition among tourism destinations is often a competition for the potential travelers' images about the destination (Baloglu & McCleary, 1999), and for this reason the stakeholders must understand that the critical fight is for space in the consumer's mind (Bornhorst et al., 2010), since destination image is key underlying factor affecting tourists' destination site selection (Hunt, 1975 ; Baloglu & McCleary, 1999; Buhalis, 2000; O'Leary et al., 2003) and their degree of satisfaction obtained with the services provided (Jang & Feng, 2007).

Thus, this paper purpose is to assess the destination image of the Algarve, before and after the tourism experience at the destination, to evaluate the impact(s) of the different tourists' experiences with the tourism destination (see figure I). In a first stage, an initial questionnaire will be applied to tourists visiting the destination. In a later stage, after the experience onsite, an additional questionnaire will be applied by email to the responds of the initial questionnaire to verify the impact of the experiences in the destination image of the Algarve. To achieve this goal, the empirical research will employ confirmatory factor analysis (CFA) and structural equation model (SEM) to test and assess the consistency of the conceptual model.

Figure I – Aim of the study



Source: Author (2013)

This investigation, according to the literature review conducted, will contribute to understand the impacts of the tourists' experiences on the destination image of the Algarve, but, it will also help stakeholders and DMOs managers to identify Algarve's strengths and weakness. Consequently, managers and stakeholders may transform threats into

opportunities, by setting the correct strategies and promotion activities based on the tourists' needs. The research recovers not only the prominent need to measure the destination image, a competitive key factor for any tourism destination success, but also, the need to assess the tourism experiences that truly influence a destination image and are considered to add value to the destination holistic (tangible and intangible) offering. Since, both of these aspects significantly and directly impact the tourists' behavior and satisfaction, and also their likelihood to return in the future (Assaker et al., 2010; Yuksel, Yuksel, & Bilim, 2010).

Although several studies have found that travelers' images were modified after visiting a particular destination (Chon, 1992; Chen & Tsai, 2007), these studies have still been unable to capture the holistic component of the tourism experiences (Echtner et al., 2003) and its impacts on the tourist's perceived destination image (Szymanski et al., 2001), as the consumption of experiences results not only of the objective experience, but also of the tourist state of mind at a particular moment in time (Andersson, 2007).

2. LITERATURE REVIEW

2.1 Destination image (DI) construct

The destination image (DI) was originally introduced by Gunn (1972), Mayo (1973) and Hunt (1975) and has been one of the most researched topics in tourism-related research (Septchenkova & Mills, 2010), despite of its nature being rather problematic (Jenkins, 1999) and a definition often avoided (Echtner & Ritchie, 2003). However, several authors have established to be formed by rational and emotional interpretations (Septchenkova & Mills, 2010) or an overall mental picture (Echtner & Ritchie, 2003). On the other hand, others limit it, to a geographical area such as a city, region or country (Buhalis, 2000), or define it on the basis of what the destination evokes, "proposes" to the tourist (Bigné, Sánchez & Blas, 2009). This led to the question, "what dimensions form the DI construct?" White (2004), considers images to be formed by different and interrelated components: known as cognitive (the sum of all knowledge, perceptions, and values that tourists hold about a destination), affective (tourists' feelings towards the destination) and conative (behavior of the tourist). Echtner & Ritchie (2003) on the other hand, considered the DI to be attribute-based (containing functional characteristics) and holistic-based ("more abstract" psychological characteristics).

As result, an overall image of a place is created as consequence of both evaluations (Baloglu & McCleary, 1999b) and the DI influence is seen at the early stage of choosing the tourism destination, because holidays are considered a high involvement purchase, tourists invest a great amount of time and money into identifying suitable places to visit (Goodrich, 1978; Laws, 1995), and for this reason the DI is used as a guide to reduce the amount of options available. However, several factors, like the tourists' familiarity with the destination (Chon, 1991; Fakaye & Crompton, 1991), the residents participation passive or active (Gallarza et al., 2002), the socio-demographic, personal and psychological consumer characteristics, such as travel motivations, aspects of learning, age, gender, social class and cultural background (Beerli & Martín, 2004; Ahmed et al., 2006), impact on the way the DI is formed or shaped.

Baloglu & McCleary (1999b) considered the DI to be formed by two main factors, stimulus factors (which are external such as physical objects and previous experience) and personal factors (the social and psychological characteristics of the perceiver. For other authors, the DI is formed from a mental construct which results of a process in which some impressions are selected from a "flood" of total impressions (Echtner & Ritchie, 2003). Gunn (1988) went further and recognized differences between the information selected

from a commercial source (induced image), and non-commercial nature (induced). Stern & Krakover (1993) also considered DI to be influenced by different sources of information but added that the characteristics of the individual as a factor that affect the perceived stimuli of the environment.

Gartner (1993:197) also suggested that, "the image-forming process can be regarded as a continuum of different agents or information sources which act independently to form one single image in the mind of the individual". In the same context, Molina, Gomez & Martin-Consuegra (2010), posited that the information sources and the destinations' attributes form the foundation for different images and experience expectations. But the most relevant aspect is the evaluation of the experience at the destination, which will also influence the DI and adjust it (Chon, 1991; Echtner & Ritchie, 1991; Fakeye & Crompton, 1991), since the tourists' choice of destination will also be based on a "benefit package, which comes from the tourist's experience and expectations that result from image formation" (Ahmed et al., 2006:63).

2.2 Tourism experiences (TE) construct

To this end, the challenge today is to uncover the essence of what exactly makes certain tourism experiences (TE) special, spectacular and fittingly, memorable (Tung & Ritchie, 2011), because if tourists end by feeling "disappointed or defrauded, the attraction may have succeeded in attracting but not in carrying out its complete function" (Gunn, 1988:47). Moreover, tourists create meanings during the production and consumption of the experience (Carù & Cova, 2003) because they're engaged in emotional events and behaviors (Angrilli et al., 1997). In this context, Carù & Cova (2003) recall they can even be in charge of co-creating their own experiences. This means that tourists' experiential consumption, depends on how the tourist based on a specific situation, or state of mind, reacts to the staged encounter (Csikszentmihalyi, 1990; Pine & Gilmore, 1999). As Smith (1978) reminds, tourists seek experiences, but the problem is tourists' state of mind (Andersson, 2007), multiplicity of available experiences, different consumption sets (Cohen, 1979) and desires (Uriely, 2005), are not taken into concern.

As Wang (2000:216) suggested, the tourism activity represents "an alternative experience of time, e.g. time off or holiday time, which appears as an alternative rhythm, free from constraints of the daily tempo". It is therefore, important to note, that like the DI the TE has its origin from a set of complex interactions between the tourist and the service provider (Addis & Holbrook, 2001; Carù & Cova, 2007). This set of complex interactions, means there's a lack of consensus (Tung & Ritchie, 2011) among authors, regarding the nature of the construct. Nevertheless, recently some consensus has emerged as to the holistic view that characterizes consumer experience as a multidimensional 'holistic' evaluation (Gentile et al., 2007).

To this end, Tung & Ritchie (2011:3) defined tourism experiences as "an individual's subjective evaluation and undergoing (i.e., affective, cognitive, and behavioral) of events related to his/her tourist activities which begins before (i.e., planning and preparation), during (i.e., at the destination), and after the trip (i.e., recollection)". Pine & Gilmore (1998) posited that the existence of four realms or dimensions comprehending: a) entertainment experiences – which refers to the tourist passive involvement; b) education experiences - in which companies can offer an educational experience to their customers (Hosany & Witham, 2009); C) escapist experiences – in which a tourist is submerged and absorbed in the event (Csikszentmihalyi, 1990); D) esthetic experiences - tourists' interpretation of the surrounding physical environment (Hosany & Witham, 2009). Gentile et al., (2007) also added a further component - pragmatic, defined as the practical act of doing something.

Other authors, focused more on the roles of authenticity (Wang, 1999), while others on the serendipitous moments (Cary, 2004).

3. SPATIO-TEMPORAL MODEL OF THE TOURISM EXPERIENCES EFFECTS ON TOURISM DESTINATION IMAGE

Based on the literature research conducted, the following conceptual framework (Figure II) is proposed, to represent the impacts and relationships between the tourism experiences and the destination image in the tourism activity. It is proposed 4 different stages:

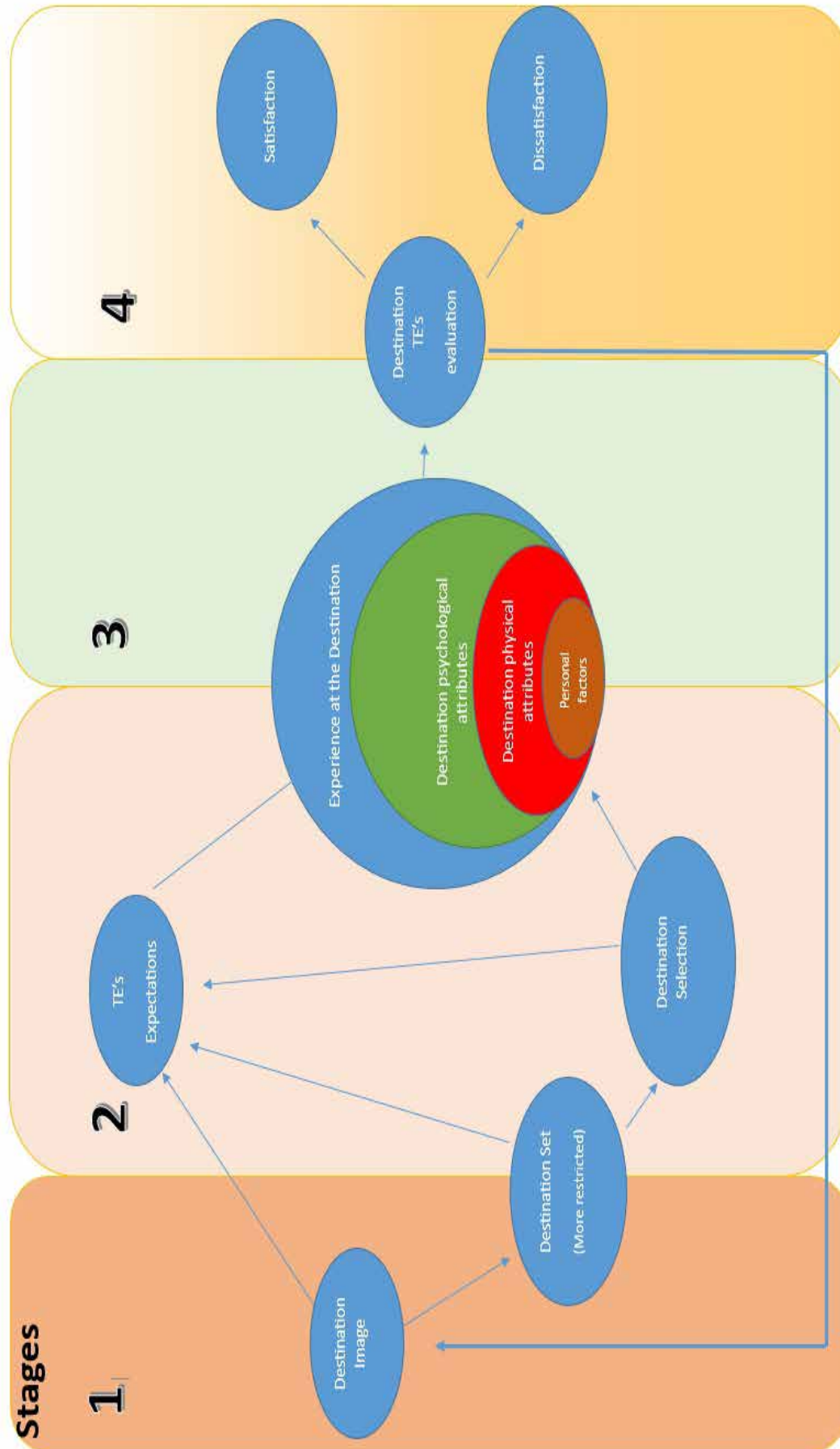
In the 1st stage, **Initial destination image stage (1)**, the tourists' experiences begin when they consider to travel, and based on those initial wishes and their personal restrictions (regarding money, length of stay, season, motivation,...), some early decisions about tourism destinations are made based upon their initial DI of potential holiday destinations (Gunn, 1988), expectations and information searched about those early set of destinations (Gunn, 1988). Consequently, tourists' will later create a smaller *destination set*, which consists in reducing the number of potential tourism destinations being consider for holidays.

In the next stage, 2nd, **pre-experience stage (2)**, the DIs positive perceptions resulted from the tourists' early images and expectations are projected into tourists' minds. Among these images, the expected TEs are also foreseen and almost lived mentally, prior to the actual visit and experience at the destination (Ahmed et al., 2006). Meaning, tourists will make their decision and create their expectations, on the basis of the DI and TEs "pre-experienced" psychologically.

Afterwards, at the 3rd stage (3), **experiential stage**, during the visit to the tourism destination the tourists assess and experience events in a holistic way, because in the human mind, a set of complex and dynamic actions take place, leading tourists to see the whole event and not the sum of the parts (Hosany & Witham, 2009). Moreover, since the tourism experiences are produced and consumed simultaneously, it implicates tourists and all of those participating actively in an event, create meanings during the consumption of the experiences (Govers, 2005), and they can even be responsible for co-creating their own experiences (Carù & Cova, 2003). In other words, the experiences that consumers encounter occur inside the tourist, and the outcome or experiential consumption depends on the personal factors (such as personal social-psychological characteristics, previous experience, among other), but also, on the expectations generated prior to the destination image perceived.

At the last stage, 4th, **post-experiential/Revisiting stage**, tourists reflect at home on their holiday experience, and remember it subjectively and uniquely, even if similar services were provided at the destination (Tung & Ritchie, 2011). The assessment or revisiting of the holiday experience not only affects the tourists' plans for the next year, but also, the final evaluation tourists' make of their TEs (satisfaction or dissatisfaction), and consequently, it will impact and change the previous held tourism DI leading to a new DI to be formed.

Figure II – Spatio-Temporal Model of the Tourism Experiences Effects



4. IMPLICATIONS

The goal set for this undergoing research is to investigate the impacts of tourism experience(s) in the destination image of the Algarve. By investigating, first the pre-conceived DI and expectations, and after, the TEs at the setting and post-experience DI of the Algarve, the impacts and relationship of both constructs can be evaluated. If the tourists' behavior is understood, DMOs stakeholders will more easily define and set their marketing strategies.

More importantly, they will be able to manage it more efficiently (Echtner & Ritchie, 2003), and new insights and a greater knowledge about tourists' TEs will be accomplished, allowing competitive advantages to be achieved (Pine & Gilmore, 1999). This way, possible impacts (negative or positive) in the TE and DI, can be more rapidly identified, and if necessary revised, enabling the stakeholders and managers of the destination, to set and promote products tourists may consider to be of added value to the general value chain, and consequently, obtain a greater economic and social return for the region. The importance and relationship between DI and TE constructs should not be ignored, since it would bring consequences to the Algarve, not only regarding the economic return, but also, regarding the expenditure necessary to attract potential tourists to the area, since the costs of "acquiring" new tourists are greater than the cost of retaining them.

The future results of this research will allow stakeholders of the tourism destination and managers of the DMOs to obtain updated and pertinent information, regarding:

- Tourists' behavior, so that they may increase the appeal of natural and man built local resources, by using the correct marketing promotion tools and strategies (Ritchie & Crouch, 2000);
- Increase the competitiveness of the destination through the use of TEs as a key factor to appeal, and engage physically and emotionally tourists (Ritchie & Crouch, 2000);
- Create an unique and distinctive positioning for the tourism destination (Echtner & Ritchie, 2003);
- To offer to visiting tourists new and authentic experiences (Ritchie & Crouch, 2000).

The study will also allow, from the tourists' perspective, to find relevant guidelines for the available resources (physical, financial and human) to be managed in a more sustainable way by local stakeholders and managers, with responsibilities in the tourism activity.

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STRUCTURAL EQUATION MODELING APPLIED TO SEX, ROMANCE AND LIMINAL BEHAVIOUR IN TOURISM CONTEXT: THE CASE OF FARO INTERNATIONAL BIKE MEETING

MODELAÇÃO DE EQUAÇÕES ESTRUTURAIS APLICADA AO SEXO, ROMANCE E COMPORTAMENTOS LIMINÓIDES EM CONTEXTO TURÍSTICO: O CASO DA CONCENTRAÇÃO MOTARD DE FARO

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ABSTRACT

Sex and romance are part of everyday life and therefore are part of the contemporary tourism experiences. Tourism, such as has been stressed by the literature, consists of a rupture with the everyday life – a liminal space-time which enables liminal behaviours. In these behaviours one can include a greater willingness for romance and sexual relationships. One of the dimensions of the theoretical articulation between tourism, romance and sexuality consists of the role played by these latter two dimensions in the decision of travelling and in the destination's choice. Sex and romance may be the main motivators for travelling or, if they are not important drivers, may occur in an “accidental” way while already at the destination. This research investigates an event where the environment (e.g. the omnipresence of erotic shows), combined with the liminal experiences, may contribute to attract tourists whose main motivations are sex and romance. The correlation between these variables was tested using structural equation modeling with latent variables, applied to 449 data surveys carried out with the bikers who visited the 29th Faro International Bike Meeting, in 2010. The results suggest that bikers come motivated not only by participation in the event but also by the expectations of having sex and getting involved in a romance. These aspects have influence in the experienced environment which, in turn, has influence in the adoption of liminal behaviours. Bikers' satisfaction is evident, as well as their intention to return, proving that a new market segment is rising up in the Algarve because of this event.

Keywords: Sex, Romance, Tourism, Liminality, Faro International Bike Meeting, Structural Equation Modeling with Latent Variables.

RESUMO

O sexo e o romance fazem parte da vida quotidiana e, como tal, fazem parte das experiências turísticas contemporâneas. O turismo, como tem vindo a ser sublinhado pela literatura, constitui uma ruptura com o quotidiano, um espaço-tempo liminar que favorece comportamentos liminóides, nos quais se pode incluir uma maior disponibilidade para o romance e para o envolvimento em relações sexuais. Uma das dimensões da articulação teórica entre o turismo, o romance e a sexualidade consiste no papel que estes últimos desempenham na decisão de viajar e na escolha dos destinos. O sexo e o romance podem ser os principais motivadores de viagem ou, por outro lado, quando não constituem *drivers* importantes, podem ocorrer de

modo “acidental” já no destino. Esta pesquisa incide sobre um evento onde o ambiente vivido (p. ex. a omnipresença de *shows* eróticos), aliado às experiências liminóides, pode contribuir para atrair turistas, cujas principais motivações são o sexo e o romance. A correlação entre estas variáveis foi testada usando a modelação de equações estruturais com variáveis latentes aplicada aos dados de 449 inquéritos feitos aos motards que visitaram a 29^a Concentração Motard de Faro, em 2010. Os resultados sugerem que os motards vêm motivados não só pela participação no evento, como pelas expectativas de terem sexo e de se envolverem num romance. Estes aspectos influenciam o ambiente vivido que, por sua vez, tem influência na adopção de comportamentos liminóides. A satisfação dos motards é evidente, bem como a propensão ao regresso, denotando que um novo segmento de mercado emergiu no Algarve por força deste evento.

Palavras-chave: Sexo, Romance, Turismo, Liminaridade, Concentração Motard de Faro, Modelação de Equações Estruturais com Variáveis Latentes.

JEL Classification: Z130

1. INTRODUCTION

Most of the studies on the relationship between sex, romance and tourism have been conducted by Asian and Oceanian countries (Bauer and McKercher, 2003; Carr and Poria, 2010, Oppermann, 1998; Pritchard *et al.*, 2000; Ryan and Hall, 2001; Ryan and Kinder, 1996; Trauer and Ryan, 2005; among others). Tourist trips are increasingly part of the imagination of individuals and, since sex is an integral part of life, it is natural that people also engage in sexual activities when travelling. Sexual experimentation does not stay at home; it goes on vacation as well! Perhaps because some of these countries are «sex tourism» destinations, the analysis focus of the majority of these studies has been on sex as the main driver in choosing a destination, where the established relationships almost always have a commercial character.

In contrast, scientific research over the relationship between these three variables (sex, romance and tourism) currently does not exist in Portugal. The knowledge produced until now is related to phenomena like prostitution, striptease or escort services (Coelho, 2009; Oliveira, 2011; 2004). Sex, when related with tourism, even if that relation is very incipient, appears in the national literature suggesting “illegal” behaviours. This is the case of the research carried out by Ribeiro *et al.* (2007), which portrays the work of some prostitutes along the border between Portugal and Spain, with the majority of their clients of Spanish origin. Even so, one cannot properly speak about a relationship between sex and tourism, since, in this case, the clients are not technically tourists but visitors.

Two of the first studies – if not the only ones – previously conducted by Portuguese authors which address the relationship between sex and tourism are the studies of Ribeiro and Sacramento (2007; 2006); however, they also focus on the «sex tourism» problem, in this case, in the northeast of Brazil.

However, the relationship between sex and tourism does not exhaust itself with the dark side of this dialectic. This relationship cannot and should not be observed only from the deviation angle (Ryan and Kinder, 1996). The majority of the literature on tourism and sex tends to focus on the unequal and exploitive nature of the encounters between tourists and their sexual partners. Specifically, literature concerns trafficking in women and children for

prostitution, the exploitation of sex workers, sex crimes, etc. In fact, many activities relating sex and tourism have negative, traumatic or exploitive characteristics; however, the use of prostitution or other forms of commercial sex represents only a small part of the sexual activity that unfolds in the tourism context. Considering an overall perspective of romantic, erotic or sexual relationships, many of them, if not most of them, are positive and gratifying for both intervenients.

The Algarve is a recognized tourism destination, and it is annually sought by thousands of national and foreign tourists. Although it is not considered a «sex tourism» destination, at least in the sense that the term has commonly assumed, it is a stage for friends, couples or families on vacation, where sexuality certainly plays an important role. Further, the setting of the Faro International Bike Meeting can be seen as a form of materializing the tourist experience in the Algarve. So the option for studying the visitors' behaviours at this bike meeting results from an explicit necessity of breaking the stereotypes usually associated with bikers and with this sort of event. Thus, in an apparently unruly environment, will the individuals adopt promiscuous behaviours? In which way does this type of tourism provide liminal behaviours? Will liminality be directly related, in one way, with the availability for sexual encounters and, in another way, with satisfaction and the intention to return?

The aim of this paper is to empirically test a proposed model using structural equation modeling with latent variables, in order to better understand the relationship between tourism and liminal behaviours and the influence of these, on the one hand, on the availability for sex and romance and, on the other hand, on satisfaction and intention to return. Through the questionnaire answers of visitors to the Faro International Bike Meeting, we intend to examine the relationships between the following constructs: environment, liminal behaviours, sex and romance, satisfaction and intention to return.

2. LITERATURE REVIEW

Modern societies are characterized by the repetitive character of everyday life (Goffman, 1993), by the need of managing impressions in terms of the social constraints and norms (Becker, 1963; Goffman, 1993; Xiberras, 1993), by the control of "moral makers" (Becker, 1963), by consumerism and by the lack of time for leisure activities (Giddens, 2002). All of these aspects create pressure on individuals and awaken the desire for an escape from the everyday inhabited space. Time and, more specifically, free time are the origins of the need for space consumption. This means that, in the era of Globalization, free time arouses the conquest of space through travel opportunities. Therefore, tourist trips are possibilities of liberation, in the sense of physical and psychological transportation from the fastidious reality of the everyday life (Bauer and McKercher, 2003). In the same sense, Ryan and Hall (2001) warn of the liminal character of tourism which stimulates the adoption of radically different behaviours from those of the everyday life. At the destination, tourists may exteriorize aspects of their *self* that are repressed by the social constraints in a normal situation (Pritchard *et al.*, 2000; Wickens, 2002). Also, Franklin (2003) admits that travelling provides anonymity and evasion of facing control, duty and obligations, additionally meaning the freedom for fantasy, imagination and adventure. This expression of *self* is related with two aspects of the individual's intimacy: first, the individual feels free to act in the way he wants in the tourism context, since he is away from the belonging society (Pritchard and Morgan, 2000); second, the individual feels that intimacy is constantly "watched over" in the normal context. This means that intimacy or, more specifically, the aspects related with love or sex orientation are restrained by the social morality and by the "double standard" that tightens sexual activity (Giddens, 1992). In contrast, the tourism context provides the

individual a greater availability and freedom to engage in sexual activities, either with their conventional partners or in casual encounters with strangers.

Although sex is part of the routine of life in bed at nighttime, it is persistently seen as an activity in which individuals may be themselves or get away from everyday life. As controversial as it may sound, the truth is that sex and sexuality are elements with decision power over the self-esteem and the well-being of the individuals because of its extraordinary character. As a result, what will be the connection between sexuality and the need for space consumption through tourism trips? According to Bauer and McKercher (2003), sex and tourism have been inextricably linked since the earliest days of travel. For as long as people have been travelling, they have been engaging in romantic and sexual encounters of various types.

The sociological reflection about tourism is relatively unanimous in the use of the concept of liminality (with origin in Anthropology of Ritual). However, much of the tourism literature that has addressed liminality prefers the use of Turner's concept of «liminal states» (Turner, 2008 [1969]). This conceptualization, applied by several noteworthy authors (Andrews and Les Roberts, 2012; Bauer and McKercher, 2003; Ryan and Hall, 2001; Selänniemi, 2003 in Bauer and McKercher, 2003), has been contributing to conferring intelligibility on the relationship between sex and tourism.

The tourism phenomenon as a liminal experience plays an important role in the sense that it provides a totally different space-time from that of production and work. In this situation, travelling can provide behaviours of transgression or, at least, opportunities for people to do things that they would not normally do at home. Indeed, the vacation trip constitutes a space-time in which it seems possible to realize all the fantasies and wishes that are denied to the social actors during their everyday life. The liminal nature of the vacation trip and of the tourism activities are effectively marked by the detachment from the worries of work; by the relaxation of social control; by the unusual consumption of foods, alcohol or even drugs; and by the «carnivalization» (Diken and Laustsen, 2004) and «staging» of these practices. All of these aspects may propitiate, or at least allow, a certain level of «depersonalization», transgression and excess that may provide increased opportunities for sex and seduction.

Sex is a natural part of life. If people participate in sexual activities at home, then certainly one must expect them to participate in sex when they travel (Bauer and McKercher, 2003). In fact, tourism simply provides another setting for sexual encounters. Moreover, sexual encounters during tourism are not necessarily associated to prostitution or escort services, although these are the most studied. The concept of liminality may be used likewise in the analysis and explanation of the non-commercial sexual activities. A «romance tourism» – lived by those who travel with the purpose of developing a vacation romance or by couples that want to invest in their relationship – may also occur (Ryan and Hall, 2001; Ryan and Kinder, 1996; Oppermann, 1998).

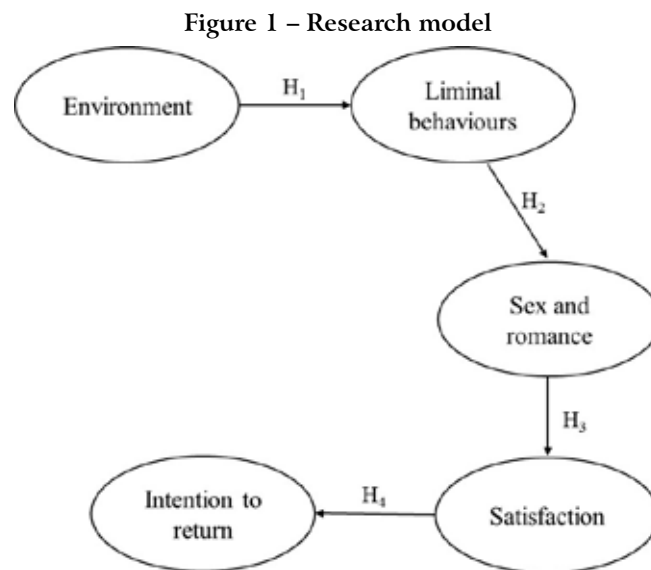
Sex and romance may be the main motivations for travel. Even when they are not – when sexual or romantic relationships occur in an «accidental» way at the destination – it is certain that they enhance the relationship between the tourist and the place and, consequently, their *place attachment* (Gu and Ryan, 2008). *Place attachment* derives from tourists' satisfaction and has impact on their intention to return and to recommend the destination. Accordingly, it has been encouraged by the tourism operators which are engaged in selling a particular place. The more «connected» to the destination that tourists become, the greater will be their probabilities of return, as well as of giving a positive message to family and friends (*Ibidem*). The economic benefits for the host regions and countries are evident, as well as the importance of gaining better knowledge of this market segment.

These are the main reasons that underline the will to understand pleasure and emotions during vacation trips, namely the way individuals live their sexuality in destinations such as

the Algarve. The tourism experience in the Algarve is materialized, in this case, at the Faro International Bike Meeting. The subsequent data analysis takes into account the answers given to a questionnaire by the bikers who attended this event.

3. RESEARCH MODEL AND HYPOTHESES

Based on the literature review of this subject and considering the unique context of this study – the biggest bike meeting in Europe and one of the biggest in the world; in other words, a liminal space-time par excellence – the proposed research model is the following (see Figure 1):



Source: Own elaboration

First, the model intends to analyse the relationship between the environment at the Bike Meeting and the adoption of liminal behaviours, suggesting that they are positively correlated. Second, the model evaluates the relationship between the liminal behaviours adopted during the event and the availability for sex and romance, suggesting that the excesses and the transgressions influence the availability for sexual or romantic activities. Third, it intends to understand the relationship between the availability for sex and romance and the individuals' degree of satisfaction, suggesting that they have a positive effect on tourists' satisfaction. Finally, it seeks to realize the relationship between tourists' satisfaction and their intention to return, suggesting that satisfaction has a positive effect on the intention to return.

There are several theoretical and empirical studies on the relationships between the environment, liminality, sexuality, satisfaction and loyalty to the destination (Andrews and Les Roberts, 2012; Bauer and McKercher, 2003; Carr and Poria, 2010; Dmitrovic *et al.*, 2008; Evans, Jamal and Foxall, 2006; Herold, Garcia and DeMoya, 2001; Jones and Sasser, 1995; McKercher, Denizci-Guillet and Ng, 2012; Oppermann, 2000, 1999, 1998; Oom do Valle *et al.*, 2006; Pritchard and Morgan, 2006; Ryan and Hall, 2001; Trauer and Ryan, 2005; Weichselbaumer, 2012; Wickens, 2002; Woodside and Lysonski, 1989; among others). However, none of them offers a simultaneous relationship between all of these constructs. Some authors (Andrews and Les Roberts, 2012; Bauer and McKercher, 2003; Pritchard and Morgan, 2006; Ryan and Hall, 2001) argue that the environment at the

destination or, in other words, the festive and relaxing atmosphere, enhances the adoption of liminal behaviours, because the true nature of tourism as a liminal experience is to represent a rupture in the everyday life. Following this line, the first hypothesis of this research is presented:

H₁ – Environment has a positive effect on the adoption of liminal behaviours.

Other authors (Andrews and Les Roberts, 2012; Bauer and McKercher, 2003; Carr and Poria, 2010; Pritchard and Morgan, 2006; Ryan and Hall, 2001; Selänniemi, 2003 *in* Bauer and McKercher, 2003) claim that liminality, as a transition of everyday roles and responsibilities for new experiences that go beyond the norms, is inwardly related with the availability for sex and romance in a tourism context. In this sense, the second hypothesis is presented:

H₂ – Liminal behaviours have a positive effect on the availability for sex and romance.

The engagement in sexual or romantic activities contributes, in turn, to the tourists' satisfaction: with the vacation trip, with the destination, with themselves (Bauer and McKercher, 2003; Oppermann, 1998, 1999; Weichselbaumer, 2012; Wickens, 2002). On this basis, the third hypothesis of this study is proposed:

H₃ – The availability for sex and romance has a positive effect on satisfaction.

Finally, the literature suggests that high levels of satisfaction lead to high levels of loyalty, so it is possible to say that satisfaction has a direct impact on loyalty (Dmitrovic *et al.*, 2008; Evans, Jamal and Foxall, 2006; Herold, Garcia and DeMoya, 2001; Jones and Sasser, 1995; McKercher, Denizci-Guillet and Ng, 2012; Oom do Valle *et al.*, 2006; Oppermann, 2000; Trauer and Ryan, 2005; Woodside and Lysonski, 1989). This study is no exception, so the fourth and last hypothesis of this research is presented:

H₄ – Satisfaction has a positive effect on the intention to return.

4. METHODOLOGY

Based on a literature review about sexuality and tourism (Ilkcaracan and Jolly, 2007; Bauer and McKercher, 2003; Herold, Garcia and DeMoya, 2001; Ryan and Hall, 2001; Pritchard *et al.*, 2000; Oppermann, 1998; Ryan and Kinder, 1996; Gagnon *et al.*, 1995; Giddens, 1992; Kinsey, 1948, 1953, among others), a questionnaire was designed with 26 open and closed questions. The random sample¹ included 470 tourists visiting the 29th Faro International Bike Meeting in 2010. From the 470 collected surveys, 449 were validated, demonstrating a non-response rate below 10.0%.

To ensure confidentiality, the names of participants were not requested, and it was assured to all respondents that their responses would remain completely confidential and anonymous, and that they would only be used for academic purposes. Participation in this study was also completely voluntary. The questionnaire was self-administered in order to guarantee the respondents' freedom of expression, as well as the absence of the researcher's influence (Patton, 1990). According to Ghiglione and Matalon (1997) the self-administered

¹ The sample size was calculated for a confidence level of 95.0% and a maximum error margin of 4.5%, based on 30,000 visitors annually.

questionnaire is also applied when the questions are likely to cause some embarrassment, as it is in the case of sexuality. The variables used in this study are of ordinal categorical type, following the recommendations of Chin (1998), Fornell and Larcker (1981) and Gefen and Straub (2005), and it uses a Likert scale of five points² (Gilbert and Hudson, 2000; Gonzalez and Bello, 2002) except for the latent variable 'intention to return'³. However, the reduced dimension of the questionnaire – considering the specificity of the event – did not allow the collection of other useful indicators. Even so, the adopted procedures are a guarantee of the validity/reliability as well as of the fulfilment of the main objective of this study.

5. DATA ANALYSIS AND RESULTS

Faro International Bike Meeting is a homosocial event. Like the majority of the leisure sports that involve risk and physical effort, motorcycling is also typified as an activity of the male domain. Even so, and like other studies suggest, the female emancipation has been bringing more women to motorcycling (Roster, 2007). These results are not an exception. In fact, although the great majority of the Faro International Bike Meeting's visitors are male (67.0%), many women already participate in the event (33.0%). The ages of participants range from 18 to 76 years old, but the average age is 35. They are Portuguese (52.1%), Spanish (22.0%) or British (18.0%); the majority are married or living together (56.8%), but others are single (30.7%). Their education level lies primarily at the high school level (49.7%) or the university level (37.9%), and they are mostly employed (82.4%). They arrived in the Algarve by motorcycle (72.4%), in the company of friends (44.8%), with a spouse/partner (27.4%), or even alone (10.0%). They stayed at the camp of the Bike Meeting (79.5%) for about five nights, which is the reason that they are designated as tourists.

Partial Least Squares (PLS) was chosen to conduct the data analyses in this study. PLS is a non-parametric strand of the Structural Equation Modeling, also designated by SEM, and it aims to examine the significance of the relationships between research constructs and the predictive power of the dependent variables (Chin, 1998). Thus, PLS is suitable for predictive applications and theory building. PLS also does not place a very high requirement of normal distribution on the source data (Chin, 1998; Gefen and Straub, 2005) and has the ability to handle a relatively small sample size (Barclay *et al.*, 1995; Chin, 1998). SmartPLS 2.0 was specifically used in this study.

5.1. Measurement model

To assess the constructs, we conducted confirmatory factor analysis (CFA) using PLS. Based on the CFA results, we analysed convergent validity, discriminant validity, and reliability of all the multiple-item scales, following the guidelines of Fornell and Larcker (1981), Gefen and Straub (2005) and Hutchinson *et al.* (2009).

In PLS, the internal consistency of each item is evaluated by the loadings (or simple correlations) of the measures with their constructs. The rule accepted by most researchers is that one should retain all of the items with loadings above the cutoff of 0.70 (Chin, 1998). In our model, loadings ranged from 0.700 to 0.911. Cronbach's Alpha is regarded as the first measure to be used for assessing the quality of the measurement model (Churchill, 1979). However, some authors (Barclay *et al.*, 1995; Fornell and Larcker, 1981; Hutchinson *et al.*, 2009) consider that this measure is very restricted, taking into account the assumption that all indicators assume the same importance level. Instead, they propose a composite

² Scale of importance: 1 – Not important; 2 – Somewhat important; 3 – Moderately important; 4 – Very important; 5 – Extremely important; and Scale of agreement: 1 – Strongly disagree; 2 – Disagree; 3 – Neither agree nor disagree; 4 – Agree; 5 – Strongly agree.

³ Scale: 1 – No; 2 – Maybe; 3 – Yes.

measure that takes into account the weight of each item in the respective construct. In this case, composite reliabilities in our measurement model ranged from 0.665 to 0.935, above the recommended cutoff of 0.50. Convergent validity is given by the weight of each item (loadings) in the construct and the corresponding *t-bootstrap*. As mentioned above, the loadings ranged from 0.700 to 0.911 ($p < 0.05$). Discriminant validity was assessed by comparing the Average Variance Extracted (AVE) of each individual construct with shared variances between this individual construct and all the other constructs. Higher AVE of the individual construct than shared variances and cross loadings suggests discriminant validity (Fornell and Larcker, 1981). Comparing all the correlations and square roots of AVEs shown on the diagonal, the results indicated adequate discriminant validity. Tables 1, 2 and 3 show all the requirements for convergent validity and discriminant validity.

Table 1 – The assessment of the measurement model

Constructs	Items	Loadings	T-statistics	Composite Reliability	AVE
Environment	The Meeting environment facilitates disinhibition	0.820	2.790	0.935	0.819
	The erotic shows at the Meeting facilitate sexual interaction	0.879	3.624		
	The Meeting environment facilitates finding a new partner	0.866	2.710		
	The Meeting environment facilitates sexual opportunities	0.865	3.076		
	The Meeting organization facilitates encounters with sexual partners	0.878	3.147		
Liminal behaviours	At the Meeting I usually drink too much	0.787	2.627	0.906	0.706
	At the Meeting I feel completely anonymous, free and without rules	0.846	3.161		
	At the Meeting I can do different things that I don't do in everyday life	0.911	4.065		
	At the Meeting I do things totally radical and socially censurable	0.812	4.120		
Sex and Romance	At the Meeting I increase my sexual activity level	0.840	3.790	0.895	0.588
	At the Meeting I usually have sex with local people	0.745	2.432		
	At the Meeting I usually have sex with other tourists	0.797	2.746		
	On vacation I am willing to pay for sexual services	0.765	1.762		
	On vacation I am willing to have sex with an unknown person	0.703	1.690		
	On vacation I am willing to have sex without condom	0.744	1.765		
Satisfaction	Overall satisfaction with the Algarve	0.868	2.019	0.702	0.549
	Overall satisfaction with the Bike Meeting	0.700	1.683		
Intention to return	Intention to return to the Algarve	0.715	1.699	0.665	0.498
	Intention to return to the Bike Meeting	0.701	1.685		

Source: Own elaboration

Table 2 – Discriminant validity

	Environment	Liminal behaviours	Sex and Romance	Satisfaction	Intention to return
Environment	0.905				
Liminal behaviours	0.904	0.840			
Sex and Romance	0.833	0.719	0.767		
Satisfaction	0.391	0.346	0.398	0.741	
Intention to return	0.287	0.276	0.246	0.647	0.665

Note: Square root of average variance extracted (AVE) is shown on the diagonal of the matrix; inter-construct correlation is shown off the diagonal. Source: Own elaboration

Table 3 – Cross Loadings

Items	Environment	Liminal behaviours	Sex and Romance	Satisfaction	Intention to return
The Meeting environment facilitates disinhibition	0.820	0.715	0.594	0.285	0.219
The erotic shows at the Meeting facilitate sexual interaction	0.879	0.796	0.706	0.422	0.263
The Meeting environment facilitates finding a new partner	0.866	0.788	0.672	0.342	0.261
The Meeting environment facilitates sexual opportunities	0.865	0.779	0.685	0.291	0.224
The Meeting organization facilitates encounters with sexual partners	0.878	0.814	0.719	0.341	0.266
At the Meeting I usually drink too much	0.701	0.787	0.551	0.256	0.242
At the Meeting I feel completely anonymous, free and without rules	0.732	0.846	0.589	0.296	0.225
At the Meeting I can do different things that I don't do in everyday life	0.873	0.911	0.734	0.343	0.260
At the Meeting I do things totally radical and socially censurable	0.716	0.812	0.521	0.257	0.199
At the Meeting I increase my sexual activity level	0.838	0.760	0.840	0.409	0.251
At the Meeting I usually have sex with local people	0.665	0.587	0.745	0.263	0.201
At the Meeting I usually have sex with other tourists	0.703	0.599	0.797	0.352	0.213
On vacation I am willing to pay for sexual services	0.510	0.417	0.765	0.260	0.145
On vacation I am willing to have sex with an unknown person	0.443	0.356	0.703	0.221	0.121
On vacation I am willing to have sex without condom	0.514	0.421	0.744	0.255	0.144
Overall satisfaction with the Algarve	0.338	0.307	0.363	0.868	0.572
Overall satisfaction with the Bike Meeting	0.232	0.193	0.205	0.700	0.363
Intention to return to the Algarve	0.180	0.176	0.211	0.462	0.715
Intention to return to the Bike Meeting	0.225	0.215	0.134	0.450	0.701

Source: Own elaboration

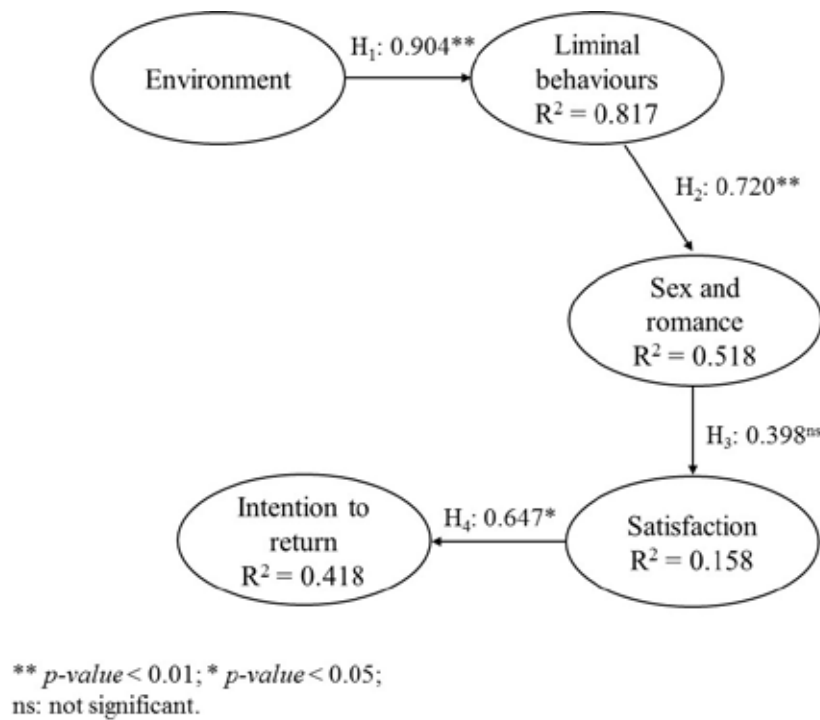
5.2. Structural model

To test the proposed hypotheses, the structural model was fitted using the full sample. Assessment of the structural model involves estimating the path coefficients and the R^2 values for each construct. Path coefficients indicate the strengths of the relationships between the constructs, while R^2 values measure the predictive power of the structural model and indicate the amount of variance explained by the exogenous variables (Hutchinson *et al.*, 2009). Through estimation via PLS, path coefficients were calculated for the hypotheses and the R^2 values for the endogenous constructs. The results are shown in Figure 2.

As indicated by path coefficients and the associated significance level, only the influence of the availability for sex and romance on satisfaction is not significant at the 0.05 level ($\beta = 0.398$, $t = 1.173$, $p < 0.05$), suggesting the rejection of H_3 .

However, the analysis of the remaining path coefficients reveals statistically significant relationships between the constructs. The significant path coefficient ($\beta = 0.904$, $t = 6.551$, $p < 0.01$) indicates that the environment has a positive effect on the adoption of liminal behaviours during the event, supporting H_1 . The adoption of liminal behaviours also has a positive effect on the availability for sex and romance ($\beta = 0.720$, $t = 3.133$, $p < 0.01$), supporting H_2 . Finally, the model shows that satisfaction has a positive effect on the intention to return ($\beta = 0.647$, $t = 1.687$, $p < 0.05$), supporting H_4 .

Figure 2 – Results of model testing



Source: Own elaboration

As shown in Figure 2, the proposed model has a reasonable predictive power. It is the construct 'liminal behaviours' which has a greater predictive power ($R^2 = 0.817$), indicating that the model explains 81.7% of the variance in this construct. The latent variables 'sex and romance', 'satisfaction' and 'intention to return' have lower levels of R^2 (51.8%, 15.8% and 41.8%, respectively), thus anticipating the possibility of improving the model, including other latent variables such as the expectations, the motivations for travelling and the psychographic profile of the respondents. Still, it is noted that the variance explained by the constructs 'sex and romance' (around 52%) and 'intention to return' (around 42%) confirms the importance of sex and romance in the tourism context, as suggested by the literature, and the role they play in tourists' place attachment (Gu and Ryan, 2008).

6. DISCUSSION AND CONCLUSIONS

This study tests a structural equation model with latent variables applied to the relationships between environment, liminal behaviours, sex and romance, satisfaction and intention to return. The aim of the study is to understand the relationships between these variables and in which way they manifest in the behaviour of bikers attending the Faro International Bike Meeting. To this end, 449 visitors were queried at the 29th Faro International Bike Meeting, and the main results are presented below.

To begin, one must say that motorcycling is a homosocial practice. In other words, it is a sport of the male domain. This assumption is supported by the data collected, taking into account that the great majority of visitors to the Faro International Bike Meeting are male (67.0%). The representativeness of women in this kind of sport is minimal (33.0%), and many of them go to the meeting with their conventional partners (47.3%). This aspect is relevant in the way that sexual and romantic practices (measured through the items: 'at the

Meeting I increase my sexual activity level', 'at the Meeting I usually have sex with local people', 'at the Meeting I usually have sex with other tourists', 'on vacation I am willing to pay for sexual services', 'on vacation I am willing to have sex with an unknown person' and 'on vacation I am willing to have sex without condom') are barred to more than half of the male visitors, or in other words, to those who go 'alone' or with 'friends' to the meeting. For them, the opportunity of finding "available" women is virtually non-existent – only 3.4% of the inquired women admitted to being alone at the meeting. This means that sexual or romantic practices during the event occur mostly with the usual partners. It is, therefore, a (re)investment in the conventional relationship, more than the search or the concretization of occasional sexual relationships.

The next topic worthy of discussion is the fact that the relationships between most of the constructs proposed in the model are statistically significant. Statistical significance is evident in the case of the relationship between the environment and the adoption of liminal behaviours ($\beta = 0.904$, $t = 6.551$, $p < 0.01$), supporting H_1 (environment has a positive effect on the adoption of liminal behaviours), in accordance with Andrews and Les Roberts (2012), Bauer and McKercher (2003), Pritchard and Morgan (2006) and Ryan and Hall (2001). In fact, an atmosphere that facilitates disinhibition, and that is characterized by a strong erotic component, acts as an invitation to the excesses and to the transgressions of the social norms. The item 'the erotic shows at the Meeting facilitate sexual interaction' is the one that mostly contributes to the construct 'environment' (*loading* = 0.879), and the item 'at the Meeting I can do different things that I don't do in everyday life' is the one that has higher "weight" in the construct 'liminal behaviours' (*loading* = 0.911). Besides these, the focus goes to the items 'at the Meeting I feel completely anonymous, free and without rules', 'at the Meeting I do things totally radical and socially censurable' and 'at the Meeting I usually drink too much', which significantly contribute to 'liminal behaviours' (*loadings* = 0.846, 0.812 and 0.787, respectively). This means that the environment at the Faro International Bike Meeting undoubtedly authorizes transgressive behaviours or, at least, behaviours susceptible of criticism in another social context, including behaviours such as the consumption of alcohol and drugs or a certain «carnivalization» (Diken and Laustsen, 2004).

In addition, the results of this study show that the liminal behaviours adopted at the meeting have a positive effect on the availability for sex and romance ($\beta = 0.720$, $t = 3.133$, $p < 0.01$), supporting the H_2 and in conformity with the literature (Andrews and Les Roberts, 2012; Bauer and McKercher, 2003; Carr and Poria, 2010; Pritchard and Morgan, 2006; Ryan and Hall, 2001; Selänniemi, 2003 in Bauer and McKercher, 2003). Indeed, it is easy to understand that the consumption of psychoactive substances, combined with the loosening of social rules, may facilitate the search of new sexual partners or a major availability for (re) investment in the established relationships. Moreover, the items 'at the Meeting I increase my sexual activity level' and 'at the Meeting I usually have sex with other tourists' are those that most contribute to the construct 'sex and romance' (*loadings* = 0.840 and 0.797, respectively). The importance they have provides evidence that the availability for sexual and romantic activities concerns conventional partners. Although some individuals manifest the willingness to get involved with strangers, their sexual opportunities are compromised, at least at the Bike Meeting where the number of single visitors is relatively small.

Despite the strong erotic component of this event, where sex and romance play important roles, the H_3 (the availability for sex and romance has a positive effect on satisfaction) was not confirmed by the results of this study ($\beta = 0.398$, $t = 1.173$, $p < 0.05$). The visitors' satisfaction seems to be more associated to the event itself, than to sexual or romantic practices. In addition, the relatively low predictive power of the construct 'satisfaction' (R^2

= 0.158) denotes the need to include more specific indicators to assess the participants' satisfaction.

In a general way, the bikers' satisfaction with the Faro International Bike Meeting and with the Algarve is high (89.1% and 90.6%, respectively). In this sense, and according to the literature on this topic (Dmitrovic *et al.*, 2008; Evans, Jamal and Foxall, 2006; Herold, Garcia and DeMoya, 2001; Jones and Sasser, 1995; McKercher, Denizci-Guillet and Ng, 2012; Oom do Valle *et al.*, 2006; Oppermann, 2000; Trauer and Ryan, 2005; Woodside and Lysonski, 1989), the intention to return is also high, supporting H_4 (satisfaction has a positive effect on the intention to return). The item that mostly contributes to the construct 'intention to return' is 'intention to return to the Algarve' (*loading* = 0.715), showing a higher degree of uncertainty about returning to the Bike Meeting. Two possible explanations might clarify this discrepancy: first, because the Bike Meeting is a scheduled event that may collide with individual availabilities; second, because the economic context of the country has been constraining family budgets, limiting participation in this type of event (primarily for the national visitors).

Finally, the results of this study contribute to the existing literature in several ways. On the one hand, it is a study about liminal behaviours that relates environment, liminality, sexuality, satisfaction and intention to return. The relationship between most of these constructs was proven. Only the relationship between the 'availability for sex and romance' and 'satisfaction' (H_3) was not statistically significant at a confidence level of 95%. On the other hand, because this study is about tourists with very particular characteristics, even if they come mainly motivated by participation in the Faro International Bike Meeting, many of them reveal their availability to get involved in sexual or romantic activities, either with their usual partners or occasional ones. They adopt liminal behaviours during the meeting and they are very satisfied with the Algarve and with the Bike Meeting, as well as showing a strong propensity for returning. Because many of them extend their stay beyond the event, choosing to spend a mini-vacation in the Algarve, the economic impacts of this aspect are fairly significant. Therefore, a deeper knowledge of their characteristics and behaviours is extremely important not only for the meeting's organization (Moto Clube Faro) but also for the hospitality sector in the region. A new market segment is growing in the Algarve due to the Faro International Bike Meeting.

Although the present study significantly contributed to the literature, it has several limitations. The dimension of the questionnaire is one of them. The context of the application did not allow exploring more questions. It was imperative that the questionnaire was as short as possible to ensure a good response from the respondents. The unruly nature of this event also prevented the choice of using other intimate questions of great importance for the study. To further determine the potential of the model, additional research is also needed, such as monitoring the study throughout other editions of the event and identifying differences in the answers according to gender.

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THE INTERVIEW: METHODOLOGICAL FRAMEWORK IN THE STUDY OF “TOURISM AND ECONOMICS: THE FARO AIRPORT (1946-73)”

A ENTREVISTA: ENQUADRAMENTO METODOLÓGICO NO ESTUDO “TURISMO E ECONOMIA: O AEROPORTO DE FARO (1946-73)”

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João Albino Silva

ABSTRACT

This methodological paper defines how to interview people regarding the decision-making process, construction and operation of Faro Airport and its role in the Portuguese tourism policy for the Algarve between 1946 and 1973. The interviewee's age makes these interviews urgent and unique. We will hear retired workers and people who held head positions at the airport or in other relevant public or private organizations. The interviews will allow the access to data otherwise not attainable or not sufficiently evident in other sources, such as documents. The interview consists of hearing the stories of the people, as a narrative, being the interview a semi-structured, guided and unstructured mix. The use of photographs during the interview will help respondents recall events that occurred decades ago. The interviewee will be selected by snowball sampling technique. Content analysis is the method to obtain data from the transcripts of the interviews, in order to construct a coherent narrative and with the contribution of all the interviews and interviewee. As field instruments, we will use an informed consent form, photographs and the confidentiality form after the interview, which responds to the ethical requirement for confidentiality, consequences of the interview and the role of the researcher.

Keywords: Interview, Methodology, Historiography, Tourism, Economics, Airport, Aviation, Algarve

RESUMO

Este artigo metodológico define como entrevistar pessoas envolvidas no processo de decisão, construção e operação do aeroporto de Faro e o papel deste na política nacional de turismo para a região do Algarve entre 1946 e 1973. A idade dos intervenientes torna urgentes, e únicas, estas entrevistas. Ouviremos trabalhadores reformados e pessoas que ocuparam posições de liderança no aeroporto e noutras entidades públicas e privadas. A entrevista permitirá aceder a informações de outro modo difíceis de obter ou perceber. A entrevista consiste em ouvir as histórias das pessoas, como uma narrativa, sendo a entrevista um misto de semiestruturada, guiada e não estruturada. Recorreremos a fotografias durante a entrevista de modo a ajudar os entrevistados a relembrar acontecimentos ocorridos décadas atrás. Os entrevistados serão selecionados através de amostragem bola de neve. A análise de conteúdo é o método adotado para obter dados das transcrições das entrevistas, de modo a construir uma narrativa coerente e com o contributo de todas as entrevistas e entrevistados. No terreno, serão usados o formulário de consentimento informado, fotografias e o

formulário de confidencialidade após a entrevista, o que responde à exigência ética quanto a confidencialidade, consequências da entrevista e o papel do investigador.

Palavras-chave: Entrevista, Metodologia, Historiografia, Turismo, Economia, Aeroporto, Aviação, Algarve

JEL Classification: N010

1. INTRODUCTION

Faro Airport and its role in the Portuguese Tourism policy for the Algarve has not yet been studied (Brito, 2003: 670, 758 & 1051). The two industries, aviation and tourism, have rarely been analyzed together to explore the connections between them (Forsyth, 2006: 224). Recent research, in the main academic sources, confirms Brito (2003) and Forsyth (2006) findings.

The interview (Pereira, 2010: 5) is one of the research tools used to study the decision and projection (1946-62) construction (1962-5) and operation (1965-73) of the Faro Airport. The interviews aims to hear retired workers or people who held head positions in the airport or in other relevant public or private organizations, such as the city council officials or other authorities, about the decision-making process, construction and operation of the airport (Pereira 2009: 10). The age of these interviewees makes this study urgent and unique. The use of interviews will allow the access to data otherwise not attainable or not sufficiently evident in other sources, such as documents.

2. TOURISM IN ALGARVE AND THE FARO AIRPORT FOUNDATION

In post-WW2 (World War 2), tourism becomes one of the main economic activities in developed countries and air traveling was a relevant aspect of it (Cunha, 2013: 32; Butler, 2009: 347). The search for the sun and the sea in warm beaches explains the biggest touristic flows in the World (Cunha, 2013: 193). Northern European countries have no climatic conditions to the beach experience compared with the Mediterranean Basin (Brito, 2003: 751; Manera, Segreto & Pohl, 2009: 4). These flows, from developed North European countries, seek for sun in the beach (Cunha, 2013: 194; Lyth, 2009: 11). Since the economic recovery after WW2 and social policies (more spare time and paid holidays), each year, millions of high-income tourists arrive in the Algarve and Mediterranean (Brito, 2003: 348, 570-1; Burkart & Medlik, 1992: 55; Cunha, 2013: 66; Leite, 2006: 8; Liu, 1994: 24). In fact, because of an economic high growth rate and cyclical stability, during the years, between 1950 and 1973, European western countries lived a 'Golden Age' (Crafts & Toniolo, 1996: 20). The investment, productivity and real wages grew and the income distribution was an important growth-reinforcing element (Crafts & Toniolo, 1996: 24). For Portugal, the international integration was relevant: for instance, being an EFTA founding member in 1960 (Neves, 1996: 340). The high growth of Europe's economy benefited Portugal since the 1960s through tourism expansion (Lewis & Williams, 1988: 102) and foreigner investment (Sutcliffe, 1996: 290).

In 1964, Portugal is still mainly unknown in the international tourism sector, although it is an exotic country, with very low prices, very kind people, great weather and excellent

beaches (Cunha, 2012: 195). Between 1950 and 1963, international tourism in Portugal had a significant increase (Lewis & Williams, 1988: 102). In 1955-56 and 1959-62 Portugal had the highest growing rate of incoming international tourists among South European countries (Câmara, 2009: 73). In 1965-67, the average daily income per tourist was much higher in Portugal than in the other Southern European countries (Câmara, 2009: 75). This was consistent with government policy: Portugal as a luxury tourism destination (Lewis & Williams, 1988: 101). In 1964, for the first time, Portugal received more than a million foreigner visitors, nearly double of 1963 (Cunha, 2013: 66). The OECD began stating that Portugal is a touristic country (Cunha, 2012: 144). In 1973, the incoming foreigner visitors to Portugal were beyond four million, the maximum in a long growing period (Lewis & Williams, 1988: 102). The growing rates in these years were higher than the OECD average (Cunha, 2013: 67-8). It was during this period that, for the first time, the nights, in Portuguese hotels, were occupied by more foreigners than nationals (Cunha, 2013: 68). Tourism and the money sent by emigrants, despite the colonial war's financial stress, were relevant factors to explain the Portuguese economic development since the 1960s (Leite, 2006: 9; Mata & Valério, 2003: 208; Lopes, 1996: 104 & Barreto, 1996:36).

Algarve's tourism success happened because of its natural amenities, the magnificent beach sand, the Northern European search for the sun and sea and the cheap prices (Brito, 2003: 709). Algarve's tourism development started in the 1960s (Correia & Kozak, 2012: 1955). However, beach tourism has shown constraints due to the seasonality impact in the destinations (Liu, 1994: 25), which also occurs in Portugal (Lewis & Williams, 1988: 103). Algarve has, as Liu (1994: 26) refers, the three key aspects to being relevant in international tourism: the geographic location (topography, climatic and other natural characteristics); the distance from the main outgoing touristic origins; and the transport network conditions (access and cost). The international tourism demand leads the hotel industry to grow and the Algarve achieved a significant number of hotel rooms in national terms, between 1962 and 1969 (Câmara, 2009: 76). Tourism grew rapidly in the mid-1960s and led to urban growth and the creation of supporting infrastructures in Algarve (Vaz, Nijkamp, Painho & Caetano, 2012: 203) and, "apart from a tool of national economic policy, tourism development is also an ingredient of regional economic policy serving to alleviate spatial inequalities" (Baaijens, Nijkamp & Montfort, 1998: 841).

The use of airspace is a matter of public authority decision under international public legislation (Vasiliadou, 2008: 59) and it was not without a struggle that private tourism operators conquered ways to improve tourism with more favorable air travelling rules (Vasiliadou, 2008: 60). These difficulties also occurred due to the direct interests of governments in public air carrier and airport management companies (Forsyth, 2008: 74). Although the Portuguese authorities look for tourism development, they did not allow, in these years, significant charter flights (Cunha, 2012: 165). The national air carrier TAP (Transportes Aéreos Portugueses) was stronger than tourism views arguing with the government (Cunha, 2012: 165). This allows us to question if TAP, as a typical legacy air carrier of the second half of XXth century (Neufville, 2008: 36; Rosa 2006: 30), was also concerned with its relevant airports and airlines development and showed no relevance to an airport in Algarve. An airport is a key factor in every international touristic destination and the decision to have, to grow or the way to manage an airport has a significant impact on a touristic region (Forsyth, 2006: 239-40) and, in Portugal, public authorities had a crucial role in all the key aspects related to it. Public policies are relevant to align the airport strategy to the touristic destination strategy (Halpern, 2008: 26; Forsyth, 2006: 236). Other public activities, like fiscal policy, civil aviation regulation and tourism public decisions and a public scrutiny of the activities and projects are relevant to tourism (Silva, 1994: 8-9, Forsyth, 2006: 241, Rodrigues, 2006). For instance, in 1950s, Portugal signed an

international convention to simplify tourists' entrance in the country (Brito, 2003: 711). The destiny advertising in the outgoing countries is also an activity depending on public initiative (Cunha, 1997: 97-8). In general, the public infrastructure (roads, telephones, etc.) are relevant to the success of an international tourism destination. Between 1950 and 1973, Portugal improved its infrastructures and the travel time to reach Portugal from European countries became shorter (Leite, 2006: 8). In a larger sense, public authorities must manage the territory, its occupation and activities to avoid what Cunha (1997: 97) states happened in Algarve, the destination degradation dynamics paradox: real estate and construction (short term gains) overlap hotel and touristic operators (long term gains).

Airports are vital to air travelling (Brilha, 2008: 167). The airline industry became central in international tourism during the second half of the XXth century (Fletcher & Westlake, 2006: 473). The advent of jet engine in civil air transport was, in many ways, relevant to international tourism (Lyth, 2002: 2). In the 1960s and 1970s, charter flights boosted the international tourism flows from Northern to Mediterranean European countries Forsyth (2008: 79). It was the air transport advances that allowed tourism to shift from local and regional to a massive flow in international destinations. New flows and the change of existing ones, with more flexibility, security, faster and, specifically, charter flights resulted in cheaper and more frequent flights (Cunha, 2013: 165-6; Burkart & Medlick, 1992: 31). Since 1958, the use of the fast and comfortable jet airplanes, in commercial aviation, was an important stepping-stone for international tourism (Lyth, 2002: 1-2; Brito, 2003: 757), by shorting time-space distances (Liu, 1994: 27). Developments in the air travelling sector, such as the charter flights (Cunha, 2013: 166) or all inclusive packages by touristic operators (Brito, 2003: 710) were crucial for the increase of tourism by offering cheaper flights and linking many more places.

Faro has a typical inbound leisure airport and serves Northern and Western Europe (ANA, 2007: 8). Faro airport opened in 1965 (Brandão, 2008: 319), nineteen years after the first legal reference to its construction (MI, 1946: 1334) and having been referred to in legal texts, in 1947, as a next project (MI&C, 1947a: 263). In this same year of 1947, the government fixed the staff contingent of all the Portuguese airports, including Faro, as it neared its construction (MC, 1947b: 1203). During this long period, several entities analyzed and some works were made about the Algarve / Faro Airport construction (CC, 1946: 21; Rosal, 1952: 126, 130, 135-6; [CPAT], 1960: 450-66) but nothing substantial happened, as Brito (2003, 758) noted. In a main Algarve newspaper, it was common to address the airport construction (JdA (1958: 1; 1959a: 1 & 4; 1959b: 1; 1959c: 1 & 3; 1959d: 1 & 3; 1960a: 1; 1960b: 1), mainly to ask for concretization. The second government investment plan (1959-64) ended with the inclusion of the Faro Airport as an investment to accomplish (Cunha, 2012: 102). In 1962, tourism is the key point to begin the airport construction and the government considers the lack of the airport a severe loss to the nation (Brito, 2003:758). The construction was fast, with legal formalities avoided, like the spending authority visa (MC, 1962: 543-4). The property acquisitions were done by the municipality of Faro, but now, with direct money from the government, by the Communications Ministry. In 1963, the 'Jornal do Algarve' announces the beginning of construction (JdA (1963: 1). During the construction, the subject was also studied by OECD (1964: 11 & 35), considering the need to have an airport able to land four-motor airplanes. At that time, in 1964, the Portuguese air traffic policy was still restrictive and not friendly to tour operators and their holiday packages (Cunha, 2012: 194). Faro airport opened on July 11th, 1965, by the Portuguese Republic President (Brandão, 2008: 319; Marques, 1999: 656), after three years of construction (ANA, 2007: 12). In 1966, after the operations began, DGSU (1966: 223) notes the lack of direct flights from outgoing tourists cities, charter flights were marked as crucial and was also noted the lack of roads and collective and individual

(rent-a-car) transportation services. Between 1965 and 1973, all kind of changes in air transport arrangements certainly happened in Faro Airport, which must be analyzed due its economic impact (Dwyer, Forsyth & Spurr, 2004: 308). In 1965, Faro Airport registered 10,034 passengers - embarked and disembarked (INE, [1966]: 333). In 1973, the figure was 467,818 passengers (INE, 1977: 254). In these years, the passenger number grew each year at least 20%, except in 1973 (6%), with real break in the succeeding years. The 1973 figure was only achieved again after 1976 (Pereira, 2009: 20).

During all that time, between 1946 and 1973, considering the political work in Parliament, and despite the limitations concerning the non-democratic political regime at the time, it was interesting to register several references to Faro Airport. The 1947 fiscal budget provided an investment in the Faro airport project (CC, 1946: 1, 16, 19, 21). Five years later, in 1952, Rosal (1952: 123, 135-6) a deputy from Algarve discussed at the main chamber, about the “Plano de Fomento” proposal, addressing the Faro Airport and showing surprise because the government provided money to the project and nothing happened. He considered that the inexistence of the Faro Airport had only an explanation: the incapacity of the local town hall authorities and the absence of action of Lisbon’s central authorities. He stated that one of the main reason to build the Faro Airport was to develop tourism. Another parliament member, Basto (1954: 826 & 829) also referred to the subject. In 1960, Rosal (1960: 843-4) addresses the subject again and, once more in 1962. This time, he refers to the future Faro Airport’s need to land jet airplanes (Rosal, 1962: 899, 903, 905), and his colleague Correia (1962: 903) comments about the need to assure direct flights. At the end of the same year of 1962, the situation was at last changing. The Faro Airport construction was ready to begin, and Deputy Sousa Rosal welcomed it (Rosal, 1962: 1347-53). In 1964, during a discussion about tourism, parliament member Bartata (1964: 3401, 3419-22) spoke about the relevance of air transport, charter flights, jet airplanes and direct flights. After Faro Airport opens, the annual fiscal budget execution report and parliament analysis, presents the evolution of operating results. Faro Airport results continuously improve and become profitable in 1968. However, the government noted the need for more investment, concluding that due to the aircraft’s continuous technological changes, there is a need for permanent investment (AN, 1966: 1, 170; [PCM], 1967: 1, 163; AN, 1969: 1, 45; AN, 1970: 17, 59; AN, 1971: 1, 44; Oliveira, M., 1973: 169-70).

3. METHODOLOGICAL FRAMEWORK

The research as a whole uses mixed methods. It aims to answer the same research questions, to collect complementary data and conduct counterpart analyses (Yin, 2009: 63). The research is also a historical work, using archival records analysis, such as newspapers (Yin, 2009: 63; Reto & Nunes, 1999: 31). The data sources include legal diplomas, newspapers, official reports, Portuguese public authorities’ documents, technical studies and projects, traveler statistics, investment expenditure, airport operation accounts, airport revenues and interviews (Pereira, 2010: 5). This mixed methods methodological design responds more to the need of a practical research rather than a paradigmatic approach (Kvale & Brinkmann, 2009: 117).

Interview

The interview is one of the used methods in this research. The use of mixed methods, upon the interview, aims to expurgate undesirable influences of the researcher from the conversations, by triangulation of the data with other sources and with the literature (Tribe, Xiao & Chambers, 2012: 23). The use of the interview is transparent and qualified in terms

of method (Tribe, 2010: 9-10). The interviews will be done as "guided conversations rather than structured queries" (Yin, 2009: 106). The interview, as a qualitative approach, satisfies the need to collect rich data and offer voice to the researched (Tribe, 2010: 8). The interview is a traditional method in qualitative research and the traditional analyses are the narrative analysis or the critical discourse analysis (Tribe, Xiao & Chambers, 2012: 22-3). In this study, the method of analysis will be the researcher reading and analysis (Tribe, 2010: 9).

The qualitative research interview aims to see the problem from the interviewee's perspectives, prior to scientific explanations. It will happen as a daily life conversation. However, it has a structure and a purpose. As an inter-view, we construct knowledge on an inter-action between the interviewer and the interviewee. Nevertheless, the interviewer and the interviewee are not equal partners: a) the researcher defines and controls the action; b) the researcher introduces the topic of the interview; c) the researcher critically follows the answers (Kvale & Brinkmann, 2009: 1-3). The interview was used long time ago to achieve systematic knowledge in History and Social Sciences (Kvale & Brinkmann, 2009: 7). The qualitative interview is an unstructured interview due the few standardized procedures for conducting these forms of interviews. Indeed, we will take took many of the methodological decisions on the spot, during the interview (Kvale & Brinkmann, 2009: 16). By applying Morse (2012: 195) criteria, our interview is a mix of "unstructured (narrative) interview", "guided interview" and "semi structured interview", so called qualitative interview (Bryman, 2012: 469). As Bryman (2012: 471) recommends, we developed an interview guide.

In this research project, the interviews objective is to hear retired workers or people who held head positions at the airport or in other relevant public or private organizations, such as the city council officials or other authorities. The interview tries to capture storytelling (Tung & Ritchie, 2011: 1373), also characterized in literature as narrative analysis (Gubrium & Holstein, 2009: 19). The interview has been used to study tourism since the 1980s and, as a tool to capture tourists' memories, has been used since the late 1990s, always with a particular difficulty: the interviewer has a relevant role in the remembering process of the interviewee, but he must be a neutral element to the data collection (Tung & Ritchie, 2011: 1373-4). It is relevant to note that we will use the interviews to study tourism but not tourists, which differs from literature review findings.

We will use in-depth interviews (Tung & Ritchie, 2011: 1376) and we must deal with issues such as the interviewee's effort to remember events of a long time ago. In fact, we do not have direct access to experience but to narratives that humans construct about their experiences and to analyze narratives is the way to achieve experiences (Gubrium & Holstein, 2009: 19). The memories of facts are not only related to the facts, but also to the social insertion of the interviewee (Gubrium & Holstein, 2009: 22). The interviews will occur in any place where the interviewed feels confident and can change place and date if the interview lasts for more than a session. The main requisite is to be conducted in a quiet, private space (e.g., meeting room) in order to provide a thought-encouraging environment (Tung & Ritchie, 2011: 1376). We will conduct the interviews (each pre-arranged and recorded if allowed) in Portuguese. The interviews are face-to-face (Tribe, 2010: 8). The duration of the interviews is not an issue and can range between few minutes to hours, in only one or in many different sessions. In all cases, the researcher tries to do several interviews, on different days, to assure the interviewee's memory arises of the past and to create trust in order to get a good talk, without barriers. In the first conversation with each person, usually, a tape recorder is not used or even asked to be used. In all the interviews, with enough confidence of respondents in the researcher, we will ask to use a tape recorder, once we have the signed informed consent to do that recording.

To help the interviewee remember the facts that happened a long time ago, we will use photo elicitation, as Harper (2002: 13-4) or Clark-Ibáñez (2004, 1507) explains it: photo

elicitation or PEI (Photo-Elicitation Interview) uses photographs during a research interview, as a way to attain the memory and as an easier way for researchers to ask questions (Clark-Ibáñez, 2004: 1512). We can also ask the interviewees to use their own photos (Clark-Ibáñez, 2004: 1509).

The purpose of this study is not to represent or express the views of all the retired workers or people who held head positions in the airport, or in other relevant public or private organizations, such as the city council officials or other authorities (population), between 1965 and 1973, the period of the study. However, a snowball sampling technique will be used, which can address some representativeness to the study (Tung & Ritchie, 2011: 1376). With the snowball sampling technique, we will ask each interviewee to suggest another or other possible interviewees (Kim, Eves & Scarles, 2009: 424). Our understanding of the social network – for instance, the airport retired workers – is not enough, for now, to know if all the bias issues referred by Illenbergera & Flötterödb (2012: 701) have enough answers to give representativeness to our snowball sampling application. This question can only be addressed with the execution of the study. Another relevant question also answered only during the execution of the study is when enough data was collected and it will be; thus, it is better to stop interviews and focus on analysis (Kvale & Brinkmann, 2009: 113).

The starting point to the interview is Faro's airport authority, which refers some names of retired workers or people who held head positions in the airport (Pereira, 2009: 10). Pereira had a meeting with a Faro airport official and it was possible to get a starting point to begin interviews. Then, by appointment of the first interviewees, it will be possible to identify other people in a snowball sampling technique. The reading of official documentation can also provide some names to explore. The interview aims to ask what each one remembers or thinks regarding the process of decision-making and project (1946-62), construction (1962-65) and operation (1965-72) of the airport and the evolution of the tourism and tourists. A content analysis will occur upon the interview data (Pereira, 2009: 9). The age of these interviewees makes this study urgent and unique. The use of interviews will allow the access to data otherwise not attainable or not sufficiently evident in other sources, such as documents.

One of the fundamental aims of this paper is to adequately prepare the interviewing fieldwork. Indeed, as Kvale & Brinkmann (2009: 102, 105) explain, to achieve results, a significant part of an interview project happens before the first interview begins.

Interview guide

It is easy to begin interviews without methodological and procedure preparation. The interview guide is a way to prevent starting the interviewing without any preceding preparation or reflection. Doing so, we avoid many difficulties that arise during the analysis (Kvale & Brinkmann, 2009: 15).

A guide helps the interviewer conduct the conversation in a smooth but effective way. In fact, the number and diversity of aspects to attend in the interview can easily disturb the conversation and a guide is useful. The interviewer must ask or record general information for contextualizing people's answers (Bryman, 2012: 473). This is also a way to help the analysis process. During recordings, new subjects to ask can arise. Therefore, after the end of all recordings with all the respondents, it can be useful to do a new interview, with each person, to ask everyone the aspects not asked before or for confirmation or clarification. Another aspect to address is the interviewer's need to use a language suitable to the interviewee's but without asking leading questions (Bryman, 2012: 473).

The interview must begin with some small talk and an initial briefing, with some explanations to get trust from the interviewee and should end with a debriefing after the interview (Kvale & Brinkmann, 2009: 128-9). Through briefing and debriefing, we inform

the participants about the purpose and procedures of the research project, addressing several ethical issues.

Ethical procedures

Some ethical issues – like (a) confidentiality; (b) who will have access to the interview or other material; (c) the researcher's right to publish the whole interview or parts of it; (d) the participant's possible access to the data – must be discussed with the interviewee (Kvale & Brinkmann, 2009: 68, 71). Figures 1 and 4 to 6 show the way the researchers will conduct the interviews in the field with proper ethical procedures assured. The researcher is who better knows what happens during and after the research. He must anticipate the ethical issues that can happen and act cautiously with the interviewee, avoiding that they feel the researcher, the research process, the study results or its publicity has violated them. The researcher must have interviewee informed consent, explicitly stating the invasion of privacy issues. More difficult but also relevant, is to anticipate and deal with interviewee deception with the study (Bryman, 2012: 135).

Informed consent is a pre-interview inevitable procedure. Interviewee must know the research purpose and they have to know how the research will happen. We also need to explain the possible risks and benefits for the interviewee. When an interviewee voluntarily accepts to participate, after adequate explanation and objective information about the right to withdraw from the study at any moment, it is time to get a written informed consent, signed by the interviewee (Kvale & Brinkmann, 2009: 70).

Confidentiality

Confidentiality in research implies that private data identifying the participants will not be disclosed (Kvale & Brinkmann, 2009: 72). Interviewer integrity must also be present at the end of the conversation to discuss with participants what they said because, several times, the interview is a pleasant conversation and participants do not realize at the moment everything they said that they might regret later (Kvale & Brinkmann, 2009: 73-4).

Confidentiality is a way to ensure that only the researcher knows who was interviewed and deals with internal confidentiality or deductive disclosure, paying attention also to the interviewee data, to ensure no one can figure out who is the interviewee (Kaiser, 2012: 457). Other kinds of confidentiality risks can happen, as the interviewee are a specific group, such as the retired workers or people who held head positions at Faro Airport or in other relevant public or private organizations, such as the city council officials, as Kaiser (2012: 458) notes. Because the subject of the study happened long time ago and the interviewees are not present workers or head office personnel, we consider as unnecessary to address confidential concerns with the airport authority, city council or other organizations (Kaiser, 2012: 460). However, depending on what arises in the interviews, some special action regarding this question of confidentiality of groups can be necessary.

For Kaiser (2012: 459), the confidentiality management not only needs the interviewee's informed consent with confidentiality terms clarified, but also must be planned in the research design, applied during the interviews, considered in data analysis and addressed when we publish the results.

The interviewer should address confidentiality in the beginning of the interview (Kaiser, 2012: 460). We also need to consider it during the interview, when the interviewee, by words or emotions, shows confidentiality concerns (Kaiser, 2012: 460-1). However, if it breaks the interview flow, we can ask the respondent, at the end of the interview, for permission for future contact to discuss questions about the data (Kaiser, 2012: 461). We can also use an end-of-interview document to obtain respondent's specific wishes of some sentences for data use and confidentiality (Kaiser, 2012: 461).

During the data cleaning, analysis and dissemination, the best strategies to deal with confidentiality are to use an end-of-interview form to prevent rich and important data from being unused, unless that is the wish of the respondent; and by presenting data and preliminary reports back to the interviewee - member checks (Kaiser, 2012: 462-3).

Informed consent

An informed consent is a tool to ensure an ethical research activity (Marzano, 2012: 444) and it will be obtained in a written form, signed by both parts, the interviewer and the interviewee, before the interview starts (Bryman, 2012: 140). However, as Marzano says (2012: 446), the inductive logic of qualitative research only allows knowing what must be consent after the end of the research work and, especially in a series of open-ended in-depth interviews. Therefore, to ensure trust between the researcher and the interviewee, the informed consent will be, in general terms, before the beginning of the interview series and we adopt some final procedures at the end of the interview.

Interviews transcribing and analysis

The interview analysis is a key aspect to determine the interview guide and determines how to conduct and how to transcribe the interviews (Kvale & Brinkmann, 2009: 190). We expect many words said by the interviewee. We need a focused transcription and an idea of the questions in advance. We have an interview goal, which allows us to control the transcript and analysis without losing a narrative approach in the end (Kvale & Brinkmann, 2009: 191-3). Narrative analysis can focus on interview stories told but can also be a construction from many episodes told by many interviewees (Kvale & Brinkmann, 2009: 222). The use of specific QDA (qualitative data analysis) software as NVIVO (Seale & Rivas, 2012: 438) will happen if necessary.

4. IN THE FIELD: INTERVIEW TOOLS

The methodological framework presented and the knowledge obtained during documental research, makes it possible to draw some documents to guide and assure properly legal and ethical concerns to the interview process and consequences. All the documents will have Portuguese written versions, the mother tongue of the interviewer and interviewees.

Interview guide

Figure 1: Interview guide shows an interview guide. Some of the protocol aspects presented are addressed in different times of the interview, avoiding too much time consumption at the beginning of the (first) session. The confidence of the interviewee will determine the adequate moment to address each guide point application. It is possible that a preliminary session, not reordered, and not previously allowed, will take place.

Figure 1: Interview guide

Faro Airport foundation and first years – retired workers, former head personnel and other people’s opinions and memories
<p>Interview guide</p> <ol style="list-style-type: none">1. The interview’s aim is to collect several data and, for each Faro Airport retired worker, former head personnel or other people, from public or private organizations, focus on questions related with their experience.2. The interviewee is free to talk as in a conventional conversation.3. In a first interview session, or in the beginning of the interview, the interviewer:<ol style="list-style-type: none">a) Introduces himself and thanks the interviewee for his or her presence;b) Explains the study;c) Explains the need to talk about some aspects, called ethical concerns, and the need to use a formal declaration, called informed consent;d) Explains that these ethical issues will be addressed again in the end of the interview, to clarify if anything said needs to be considered whether to be used or not in the study;e) Asks if the interview can be recorded, explaining that at any time it can be stopped.4. The interviewer explains the informed consent, including:<ol style="list-style-type: none">a) Explicitly telling the interviewee his or her right to withdraw from the interview;b) Answers all the interviewee’s questions about the study and the informed consent;c) Obtains the signature, in two originals, keeping the interviewee one;5. The interviewer writes and records the place, date, hour, interview beginning and end time of each session;6. The interviewer asks personal data from the interviewee, to characterize the interviewee and to record interviewee’s social insertion (interests, familiar status, club belonging or other activities done, to comply with some methodological needs to validate interview data):<ol style="list-style-type: none">a) Name, age, gender, place of birth and place of residence before working at the airport (or in other place if he or she was a local authority official or other) – if came to Algarve, when and why;b) Date that began working at the airport and first work position; work experience before working in the airport (or in other organization); academic studies at that time, marital status at that time;c) If the interviewee changed marital status, had children or lived other important life facts during the work period in the airport (or in other organization) and, if so, if some other colleagues were involved: for instance: married with a colleague;d) Date and position change at the airport (or in other organization) during the time worked there;e) Date and reason to end the work experience in the airport (or in other organization) - to go to a new job, to retire, etc.;f) Some other dates and facts that the interviewee considers relevant to the researcher to know;g) Contact data from the interviewee and, eventually, of some relative;h) Other social aspects to characterize interviewee;7. To do the interview, keeping in mind the questions to address. The questions, to start the conversation, are only a few, and then, only some guidance is needed to avoid straying from the subject of the interview;8. During the interview, to ask several times if the interviewee is tired and want to continue in another time;9. To collect the name of some colleagues and superiors and the date of each reference (when they worked or contacted);10. To ask if the interviewee has, can show and allow the researcher to scan, archive and to use photographs about the airport and Algarve between 1946 and 1973;11. The interviewer writes and records the place, date, hour and end of the interview time of each session;12. If more than a session occurs, to have a conversation about the last session, to confirm and clarify what was told;13. To do some weeks after the last interview session, a summary interview, to confirm some key aspects that arise during analysis and to change, if necessary, the informed consent;14. In the end, the researcher will thank the interviewee by his or her useful collaboration in the study and asks if he or she wants to know the conclusions of the study later, when it is ready.

Source: adapted from Bryman (2012: 141), Clark-Ibanez (2004, 1507), Gubrium & Holstein (2009: 22), Harper (2002: 13), Kaiser (2012: 462), Kvale & Brinkmann (2009: 196) and prepared by the authors.

Photographs use

To help interviewee remember facts occurred decades ago, we will use some photographs, like those in Figure 2: Example of a picture to use to help interviewee remember facts to answer questions and Figure 3: Another example of a picture to use to help interviewee remember facts to answer questions. The researchers will try to get photographs from the interviewee, both for the interview and the research itself.

Figure 2: Example of a picture to use to help interviewee remember facts to answer questions



Source: Marques (1999: 656)

Figure 3: Another example of a picture to use to help interviewee remember facts to answer questions



Source: ANA (2013)

Informed Consent

It is possible that a preliminary session will take place, depending on the confidence of the interviewee. In that case, the informed consent will be given after this first introductory session.

The informed consent will be signed in a Portuguese written version as shown in Figure 4: Informed consent.

Figure 4: Informed consent

<p>Faro Airport foundation and first years – retired workers, former head personnel and other people’s opinions and memories</p> <p>About the study</p> <p>I am very thankful for agreeing to participate in this study. This document explains the study and is the informed consent from you to participate in it.</p> <p>The purpose of the study is to listen and record what retired workers and other people have to say about the Faro Airport foundation and first year’s operation (until 1973). The study is integrated in the context of the researcher’s Ph. D. research work of the University of Algarve;</p> <p>As a researcher of the University of Algarve, I, or other members of the study team, will interview you, once or more times, with or without recording of what is said, including the explanation of the study and the answers to all your questions about it.</p> <p>You can at any time, by any reason to contact me.</p> <p>The researcher: Renato N. Pereira, rnper@ualg.pt, 91 55 99 290, Faculty of Economics, University of Algarve.</p> <p>Informed consent</p> <p>1. I, _____, the undersigned, have read this informed consent, which the researcher explained to me the study and my role in it and I accept to participate;</p> <p>2. I was free to ask questions; the researcher answered them; explained what I need to understand concerning the study and my participation in it;</p> <p>3. I agree to do the interviews and I agree with audio recording of them, if the researcher decides to do it;</p> <p>4. I had enough time to think about my participation in the study and my agreement is a reflected decision;</p> <p>5. Regarding the confidentiality concerns, I know that the present informed consent is generic and it is not possible to anticipate all that can be said during the interviews and can happen in all the study stages;</p> <p>6. Therefore, I know I can ask specific confidentiality treatment to some data I will give during the interviews, despite the generic application that I choose in 12. of the present informed consent;</p> <p>7. Thus, I want and agree to be contacted after the interviews, to discuss some aspects, before the end of the study and before the publication or presentation results, to decide in definitive terms, my participation in the study. My contacts are: _____;</p> <p>8. I understand that my data will be used by the researcher’s but it will not revealed to people outside the study;</p> <p>9. I know that I can withdraw from the study at any moment and will not need to explain why;</p> <p>10. I agree and I also sign in this informed consent the copyright of this study to the researcher;</p> <p>11. I agree that the study material will be kept, including interviews’ sound recordings, by the researcher and by the University of Algarve’s archives repositories, with the guarantee stressed in 8.;</p> <p>12. In general, if 6. Is not applicable, of the present informed consent, I choose as confidentiality terms:</p> <p>_____ a) The researcher is allowed to use and share the interview data freely just I provided it. No details need to be changed. My real name can be used in publications and presentations;</p> <p>_____ b) The researcher is allowed to use and share the interview data freely just as I provided it. However, my real name must be omitted. I realize that others can identify me by the data I provided in the interview even if my name is changed;</p> <p>_____ c) The researcher is allowed to use and share the interview data I provided. However, my real name must be omitted and other details and data must be changed to ensure that I will not be identified by others;</p> <p>_____ d) _____</p> <p>_____.</p> <p>13. I agree to give to the study the name of work colleagues or other people to be invited also to the study and I agree that these colleagues know that the source to his or her invitation was me;</p> <p>14. In the end of each interview, a post-interview confidentiality form will be also signed, to ensure accurate use of some eventual specific data referred to during the interview.</p> <p>15. This document has two originals, each one to each part, the interviewee and the researcher.</p> <p>Faro, ____ of _____ of 201____,</p> <p>_____ [date] _____ [respondent’s signature]</p> <p>_____ [date] _____ [researcher’s signature]</p>
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Source: adapted from Kaiser (2012: 462) and Bryman (2012: 141)

Interviewee photographs use consent

The interviewee will be asked to show, allow the scan and the use of personal photographic material about the Faro airport area and Algarve between 1946 and 1973.

In Figure 5: Interviewee's photographs consent to scan, archive and use by the researchers it is shown the document to assure the interviewee allowance to use his/her photographic material. It will be signed in a Portuguese written version.

Figure 5: Interviewee's photographs consent to scan, archive and use by the researchers

Faro Airport foundation and first years – retired workers, former head personnel and other people's opinions and memories				
Interviewee's photographs scan and use by the researchers				
It is important for the study to access and use photographs of the Faro Airport area and Algarve, between 1946 and 1973.				
The researchers will use some material collected in newspapers and other public sources.				
However, it is important, for the development of the interview and the study, to have access to as many photographs as possible about the subject of study.				
Therefore, the researchers may ask the interviewee to allows the use of his or her photographs, being their contact and person in charge Renato N. Pereira, rnper@ualg.pt , 91 55 99 290, Faculty of Economics, University of Algarve.				
1. I, _____, the undersigned, have read and understood this agreement and:				
a) ____ I accept to use personal photographic material during the interview and, if so, to be video recorded or photographed;				
b) ____ I accept the scan of the photographic material that I decided to show the researchers, which they can keep it in personal archive and in the Algarve University's official archives;				
c) ____ I accept that the scanned photographic material can be publish in the researchers' work and they can use it in public exhibitions.				
2. This informed consent will have, if so, an annex, with the list of the photographic material allowed in 1.b) or 1.c) terms.				
3. This document and its annex has two originals, each one to each part, the interviewee and the researcher.				
Faro, ____ of _____ of 201____,				
_____ [date] _____ [respondent's signature]				
_____ [date] _____ [researcher's signature]				
Annex:				
Interviewee id.	Photo nr.	Content	Taken year/month/day	Taken place
_____	_____	_____	_____	_____

Source: prepared by the authors

Post-interview confidentiality form

At the end of each interview, the interviewee will confirm the informed consent, as shown in Figure 6: Post-interview confidentiality form, signing a Portuguese written version of it.

Figure 6: Post-interview confidentiality form

<p>Faro Airport foundation and first years – retired workers, former head personnel and other people's opinions and memories</p> <p>Post-interview confidentiality form</p> <p>The informed consent stresses in generic terms confidentiality concerns. However, during the interview, some specific aspects can deserve different confidentiality attention.</p> <p>Please, choose one of the following options or write your own option:</p> <p>a) The researcher is allowed to use and share the interview data as the informed consent states;</p> <p>b) The researcher is allowed to use and share the interview data as the informed consent states; but not for the bellow-identified data, which can be treated as defined in 12. a) of the informed consent:</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>c) The researcher is allowed to use and share the interview data as the informed consent states; but not for the bellow identified data, which can be treated as defined in 12. b) of the informed consent:</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>d) The researcher is allowed to use and share the interview data as the informed consent states; but not for the bellow identified data, which can be treated as defined in 12. c) of the informed consent:</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>e) The researcher is not allowed to use and share any of the interview data as informed consent states; and I ask for a future contact to see, discuss and decide what to do. My contacts are: _____</p> <p>_____</p> <p>This document has two originals, each one to each part, the interviewee and the researcher.</p> <p>Faro, ____ of _____ of 201____,</p> <p>_____ [date] _____ [respondent's signature]</p> <p>_____ [date] _____ [researcher's signature]</p>

Source: adapted from Kaiser (2012: 462)

5. FIELDWORK PLAN

The fieldwork will take place in the next months, by applying the interview tools shown in this paper.

6. CONCLUSION

This methodological paper defines how to interview people regarding the process of decision, construction and operation of Faro Airport and its role in the Portuguese tourism policy for the Algarve between 1946 and 1973. The interviewee's age makes these interviews urgent and unique. We will hear retired workers and people who held head positions at the airport or in other relevant public or private organizations. The use of interviews will allow the access to data otherwise not attainable or not sufficiently evident in other sources, such as documents. The interview consists of hearing the stories of the people, as a narrative,

being the interview a semi-structured, guided and unstructured mix. The use of photographs during the interview will help respondents recall events that occurred decades ago. The snowball sampling technique to choose the interviewee will be used. Content analysis is the method adopted to obtain data from the transcripts of the interviews, in order to construct a coherent narrative and with the contribution of all the interviews and interviewees. This paper allowed us to properly design the interview tools to use in the fieldwork, anticipating the interviewing cycle as a whole assuring an effective and productive work and addressing the ethical issues that research poses when having people hear and use personal data.

ACRONYMS

BEA: British European Airways.

EFTA: European Free Trade Association.

OECD: Organization for Economic Co-Operation and development. [Today's designation].

PEI: Photo-Elicitation Interview.

QDA: Qualitative Data Analysis software.

TAP: Transportes Aéreos Portugueses.

WW2: Second World War.

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